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ABSTRACT

This booklet is designed to be used by participants in the 1999 High School Counselors Training Program sponsored by the United States Department of Education. The program is divided into eight sessions that teach high school counselors how to help their students look for financial aid opportunities in higher education. Session One, "Introduction," discusses common myths and basic facts about student financial aid. Work study, loans, and grants are discussed. Counselors are taught how to fill out a Free Application for Federal Student Aid (FAFSA) in Session Two, "Completing the FAFSA." Recent changes in the form are discussed and 34 commonly asked questions are answered in this section. Session Three, "Using the FAFSA on the Web," discusses the advantages and features of the Web-based form and provides step-by-step instructions for completing it. Section Four, "Getting the Results," explains what the central processing system does with the application data, the basic formula used to calculate the expected family contribution (EFC), how certain data elements affect the EFC, reviewing the student aid report and locating data, and making corrections. In Section Five, "What Does a College Do?," participants learn about federal verification, financial aid packages and how to interpret them, some special circumstances and how to handle them, and when students receive their aid. Session Six, "Where to Find Information," discusses the federal student aid information center, school shopping tips, scholarship search services, financial aid nights, and other available resources. Section Seven, "Case Studies," provides three case studies involving students applying for financial aid. All forms regarding financial aid are included as examples. The final session provides group activities. (Author/MKA)

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1999
High School Counselors Training

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Participant's Guide

United States
Department of Education

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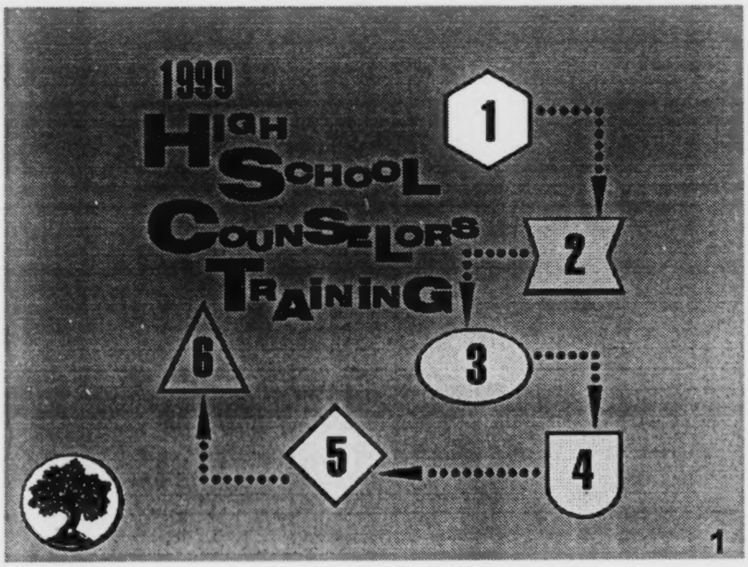
INTRODUCTION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HIGH SCHOOL COUNSELORS TRAINING

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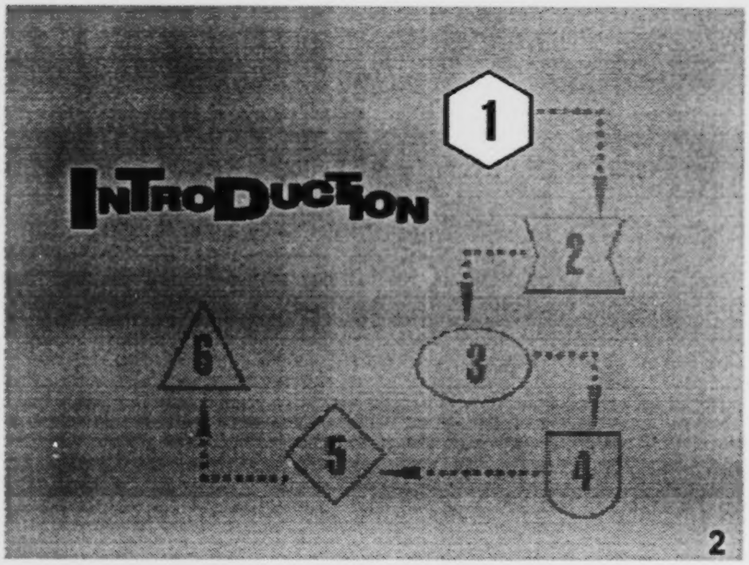

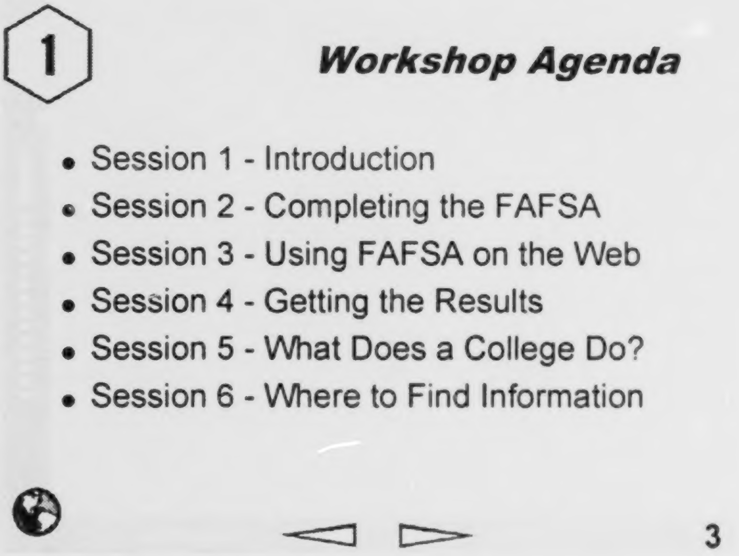

Workshop Agenda

- Session 1 - Introduction
- Session 2 - Completing the FAFSA
- Session 3 - Using FAFSA on the Web
- Session 4 - Getting the Results
- Session 5 - What Does a College Do?
- Session 6 - Where to Find Information

Notes

1

Session 1 Objectives

During Session 1 you will learn about:
- The materials in your Participant's Guide
- Common myths held about student aid
- Basic facts about student aid

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Participant's Materials

- Participant's Guide
- FAFSA
- FAFSA on the Web Toolkit

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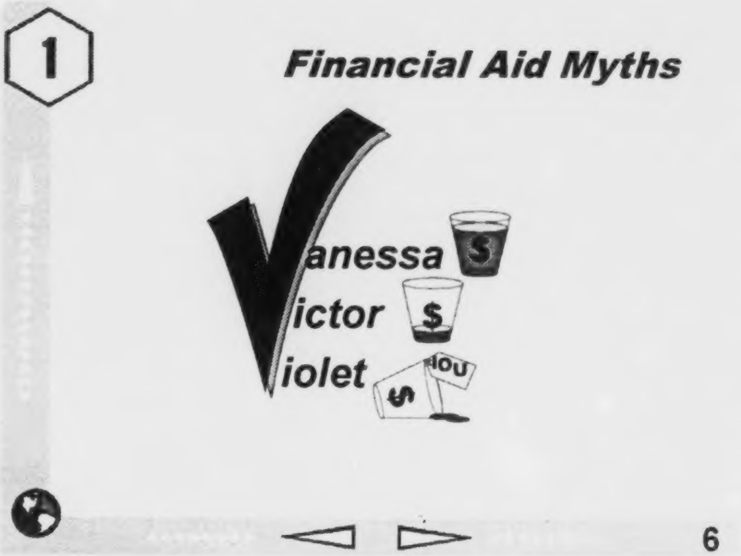

Financial Aid Myths

The Myths

Vanessa's father is an elementary school teacher and her mother is a real estate attorney with a small law firm. According to the myth she believes, Vanessa tells you, "My family makes too much money to get financial aid. We are not poor enough."

Victor, another high school senior, is considering attending the local graphic design school next year. He is worried about his family's finances. Both parents had been working, but his mother recently became a victim of corporate downsizing, and was laid off. Victor says: "I don't want any loans. I think I'll be able to get all grants and scholarships to pay for my education."

Violet is near the top of her graduating class and has aspirations of attending a large university to study software engineering. Her parents divorced four years ago and she lives with her mother, a sales clerk at the local drugstore. Violet tells you: "I've heard that it doesn't matter if I don't pay back my loans. The government can't do anything about it."

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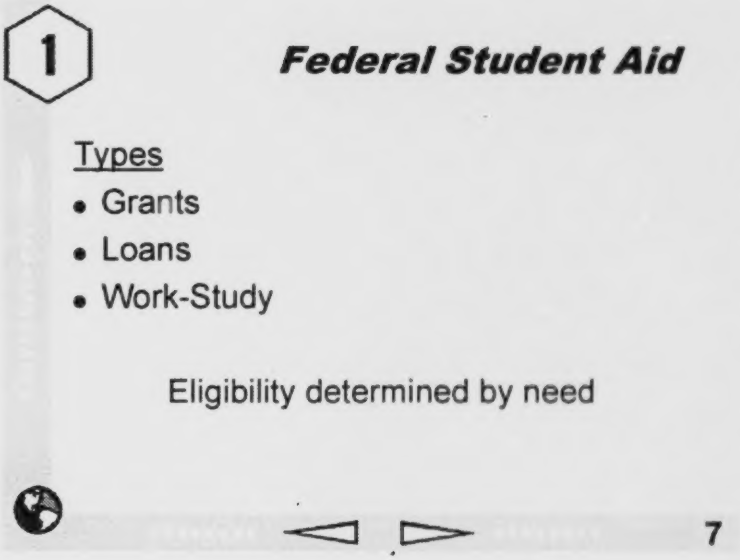

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Federal Student Aid

Types

- Grants
- Loans
- Work-Study

Eligibility determined by need

7

Grants, or "gift aid," are funds awarded to students based on their financial need and do not need to be repaid.

Loans are widely available to all classes and types of students. Students must repay these funds once they leave school, even if they have not successfully completed a course of study.

Students employed in certain jobs while they are enrolled in school earn **work-study** funds. These funds, awarded based on the needs of a school's population, are earned and do not need to be repaid.

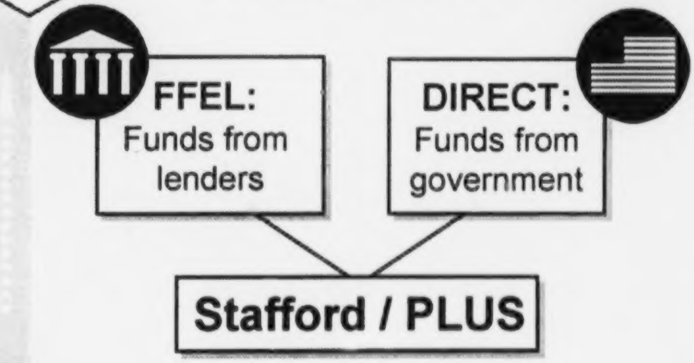
Both loans and work-study assistance are referred to as "self-help aid."

Notes

1 Federal Pell Grant Program

- First type of federal aid awarded
- Eligibility based on need
- Available to students without a bachelor's degree or equivalent
- 1999-2000 maximum Pell Grant: $3,125

1 FFEL and Direct Loans



FFEL: Funds from lenders

DIRECT: Funds from government

Stafford / PLUS

William D. Ford Federal Direct Loan Program	Federal Family Education Loan Program
FAFSA is the application	Student must fill out FAFSA and a separate Stafford Loan application
Funds come from the government	Funds come from a lender
Borrowers can repay using several different repayment plans, including income-contingent repayment	Borrowers can repay using several different repayment plans, but they differ from those available under Direct Lending
Loans carry a variable interest rate, capped at 8.25%	Loans carry a variable interest rate, capped at 8.25%
Loan limits are set by law, and are $2,625 for first-year borrowers	Loan limits are set by law, and are $2,625 for first-year borrowers
Students receive funds through the postsecondary institution in at least two installments. Funds must first be applied to pay for tuition and fees, room and board and other school charges.	Students receive funds through the postsecondary institution in at least two installments. Funds must first be applied to pay for tuition and fees, room and board and other school charges.

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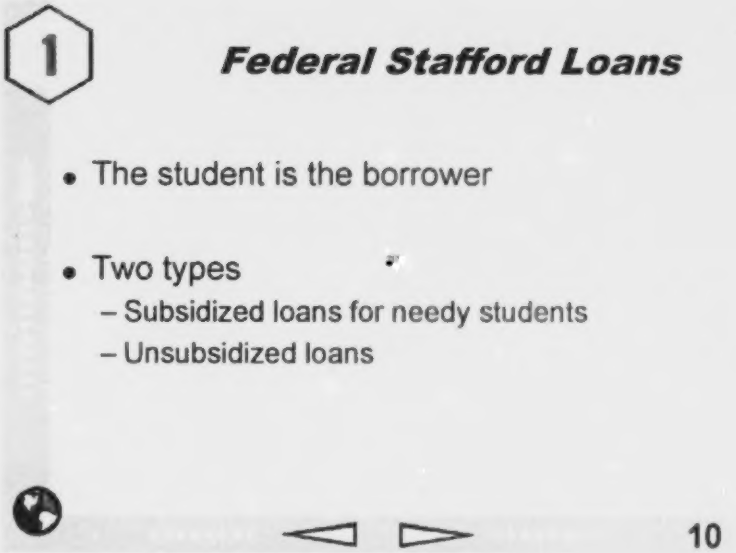


Federal Stafford Loans

- The student is the borrower
- Two types
  - Subsidized loans for needy students
  - Unsubsidized loans

10

If a student is…	Are they eligible for a deferment on their Stafford Loan?
Enrolled at least half time at a postsecondary school	Yes
Studying in an approved graduate fellowship program or in an approved rehabilitation training program for the disabled	Yes
Unable to find full-time employment	Yes, for up to three years
Experiencing economic hardship, according to standards set by the Department of Education	Yes, for up to three years

When talking to students about their student aid options, emphasize that when they sign their name on a Stafford Loan promissory note, they are promising to repay this money when they leave school. Urge them to read and keep copies of every document they sign, and to READ THEIR MAIL. Students can find information about debt planning at *http://www.ed.gov/DirectLoan/*

Notes

1 Campus-Based Programs

- Administered on campus by the financial aid office
- Funds are limited
  - Federal Supplemental Educational Opportunity Grants (FSEOG)
  - Federal Work-Study
  - Federal Perkins Loan Program

1 FSEOG

- Gift aid for undergraduates with exceptional need
- Awarded to neediest Pell Grant recipients first
- Grant size depends on school's funds, but cannot exceed $4,000 (or $4,400 for study abroad)

Schools receive limited amounts of federal funds for use in the campus-based aid programs each year, and must decide how to fairly distribute these funds to their students. Since these limited funds can run out, urge students to complete the FAFSA as early as possible. Postsecondary schools establish their own deadlines for these programs, which usually fall in February or March.

Notes

Federal Work-Study

- Students work on- or off-campus
- Students must be paid at least the federal minimum wage
- Amount earned by students is preset by school

Federal Perkins Loans

- Low-interest loans (5%)
- Available to needy undergraduate, graduate and professional students
- Loan amounts based on school's funds, but no more than:
  - $4,000 for undergraduates
  - $6,000 for graduates

Notes

Federal PLUS Loans

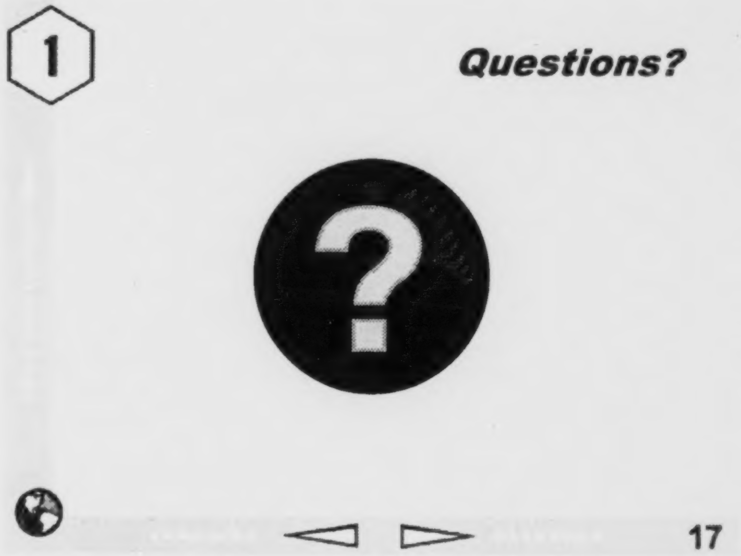
- Parent is the borrower
- Parent eligibility is not need-based
- Parent must pass credit test
- Parent can borrow up to the cost of attendance
- Parent must repay

Other Aid Resources

- Leveraging Educational Assistance Partnership Program (formerly SSIG)
- State prepaid tuition plans
- AmeriCorps
- Assistance for aspiring health professionals
- Employee benefits
- Outside scholarships

In recent years, prepaid tuition plans have become very popular tools for saving for educational expenses. The details of these programs vary from state to state. Currently, thirty-three states participate in such programs. Additional information about prepaid tuition plans and the states that offer them is available at *http://finaid.org/otheraid/prepaid.phtml*

The Department of Health and Human Services oversees a number of programs that assist students studying a wide spectrum of health disciplines. Information about these programs is available at *http://www.hrsa.dhhs.gov/bhpr/dsa/pages/programs.htm*



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Questions?

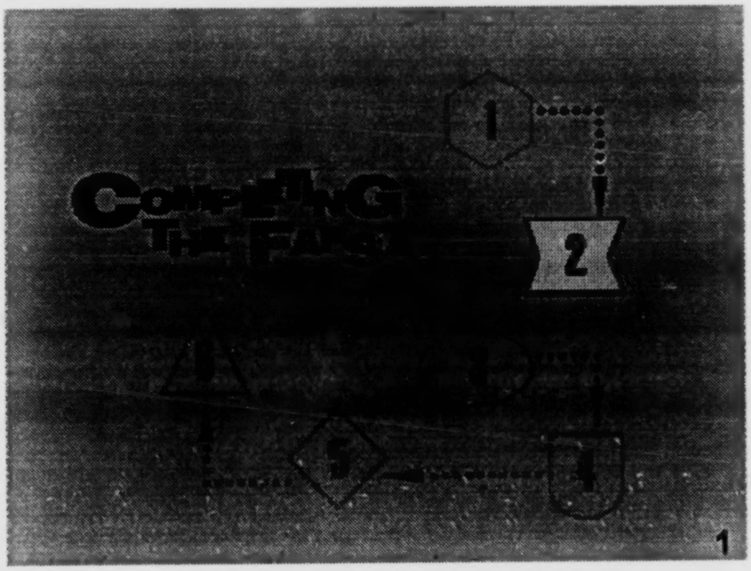
Title IV Programs Summary

Title IV Program	Type of Aid	Application Required	Award/Load Determination	Aid Recipient	Award/Loan Limits	Need Analysis	Disbursement/ Repayment
Federal Pell Grant	Gift Aid	FAFSA	Specified in ED's annual payment and disbursement schedule	Only undergraduates working towards first bachelor's degree	$3,125 1999-2000	Based on need	School acts as ED's agent to disburse; No repayment
Campus-Based Aid Programs							
FSEOG	Gift Aid	FAFSA	School's financial aid policy and available funds	Only undergraduates, with priority given to Pell Grant recipients	$4,000 a year except in case of study abroad, where up to $400 more a year is allowed	Based on need	The school disburses funds to students; No repayment
FWS	Self-Help Aid			Undergraduate or graduate/professional students	No annual award maximum		School disburses earned funds to students at least monthly; No repayment
Federal Perkins Loan					$4,000 a year for undergraduates and $6,000 a year for graduate/professional students		The school disburses funds to students; Repayment required
Direct Loan and FFEL Programs							
Subsidized Loan	Self-Help Aid	**Direct Loan**: FAFSA only **FFEL**: FAFSA and FFEL common application	A student's subsidized loan added to the EFC and other estimated financial assistance (EFA) cannot exceed cost of attendance (COA)	Undergraduate or graduate/professional students	From $2,625 to $18,500, depending on grade level	Based on need	**Direct Loan Program**: ED disburses to school; school disburses funds to student; repayment required **FFEL Program**: Lender disburses, school delivers funds; Repayment required
Unsubsidized Loan			The student's unsubsidized loan added to other EFA cannot exceed COA			Not based on need	
PLUS Loan		PLUS Loan application	The parent's PLUS Loan added to the student's other EFA cannot exceed student's COA	Parents of dependent undergraduates	No cap, but when added to student's other EFA cannot exceed student's COA		

Program-Specific Student Eligibility Criteria

Program	Who is Eligible?	Criteria
Federal Pell Grant	• Undergraduates only • May not have bachelor's or first professional degree (except for students seeking teacher certification at schools not offering undergraduate degrees in education)	• Students must have a SAR or ISIR on file with the school • Less-than-full-time, including less-than-half-time, students are eligible
FSEOG	• Undergraduates only • May not have bachelor's or first professional degree	• Must be awarded first to students with exceptional financial need (that is, lowest EFCs) • Priority to students with exceptional financial need who are eligible for Federal Pell Grants
Federal Perkins Loan	• Undergraduates • Graduate students • Professional students	• Priority to students with exceptional financial need (as defined by the school) • Students must be willing to repay their loans • Must have determination of Federal Pell Grant eligibility • May not be in medical internship or residency
FWS	• Undergraduates • Graduate students • Professional students	• See comments below for "FSEOG, Federal Perkins Loan, and FWS"
FSEOG*, Federal Perkins Loan, and FWS	• Undergraduates only* • Graduate students • Professional students	• Demonstrate need according to Federal Need Analysis Methodology • Less-than-full-time students are eligible - A "reasonable share" of a school's allocation of campus-based funds must be awarded to less-than-full-time students and nontraditional students
Federal Subsidized Loan and Federal Direct Subsidized Loan	• Undergraduates • Graduate students • Professional students • Students enrolled in courses prerequisite to enrollment in a degree or certificate program • Students enrolled in a teacher certification program	• Students must: - Be enrolled at least half time - Demonstrate financial need according to the Federal Need Analysis Methodology • Eligibility for Federal Pell Grants must be determined prior to certifying loan applications and, if eligible, students must apply for Federal Pell Grants
Federal Unsubsidized Loan and Federal Direct Unsubsidized Loan	• See Federal Subsidized Loan and Federal Direct Subsidized Loan	• Students do not have to demonstrate financial need • Student eligibility for Federal Pell Grant and Federal Subsidized or Federal Direct Subsidized must be determined • Students must apply for Federal Subsidized or Federal Direct Subsidized first; EFA includes subsidized loan amount for which students are eligible • Students must be enrolled at least half time
Federal PLUS Loan and Federal Direct PLUS Loan	• Parents of eligible dependent undergraduate students	• Students for whom parents borrow must be eligible, regular students enrolled at least half time • Parents must: - Meet same citizenship requirements as an eligible student - Not be in default on a Title IV loan - Not owe an overpayment on a Title IV grant or loan - Not have an adverse credit history

COMPLETING THE FAFSA


COMPLETING THE FAFSA

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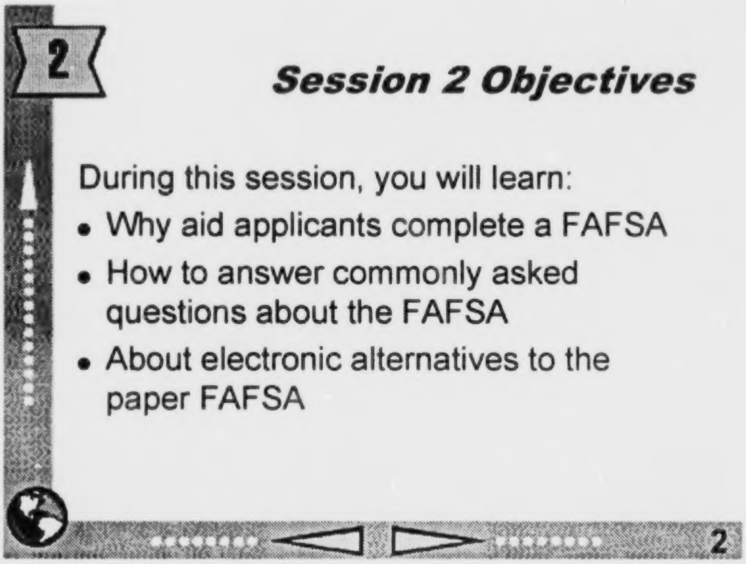

Session 2 Objectives

During this session, you will learn:

- Why aid applicants complete a FAFSA
- How to answer commonly asked questions about the FAFSA
- About electronic alternatives to the paper FAFSA

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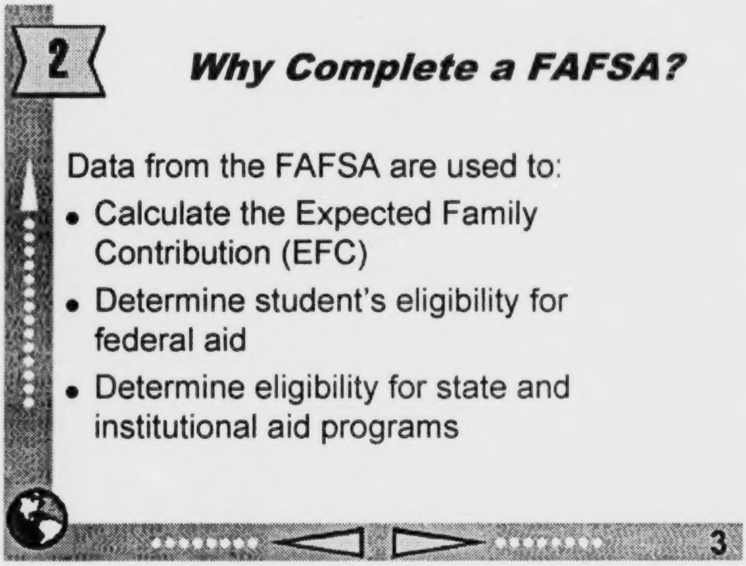

Why Complete a FAFSA?

Data from the FAFSA are used to:

- Calculate the Expected Family Contribution (EFC)
- Determine student's eligibility for federal aid
- Determine eligibility for state and institutional aid programs

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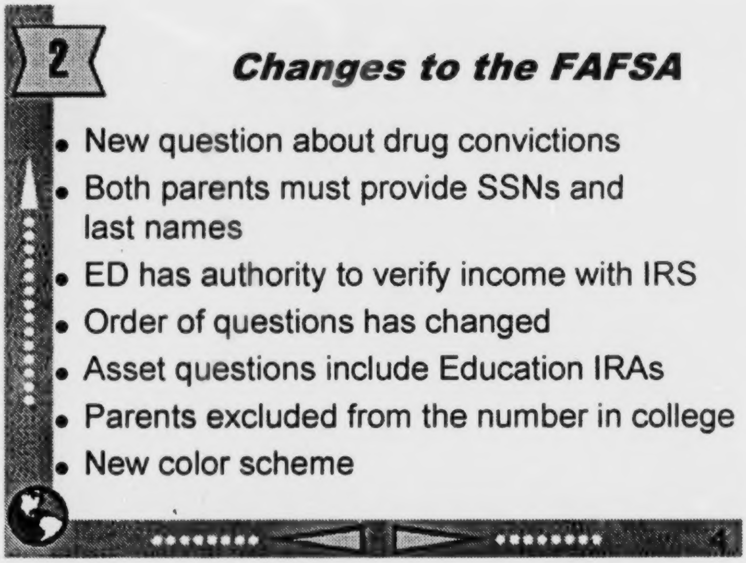

Changes to the FAFSA

- New question about drug convictions
- Both parents must provide SSNs and last names
- ED has authority to verify income with IRS
- Order of questions has changed
- Asset questions include Education IRAs
- Parents excluded from the number in college
- New color scheme

Notes

Notes

Changes in the FAFSA for 2000-2001

Section	Change
Step One	A drug conviction eligibility question (question 28) has been added.
	The instructions for questions 1-3 (student name) have been clarified to specify use of the student name "as it appears on applicant's Social Security card."
Step Two	Questions (52 and 53) about veterans' education benefits have been moved from page 3 to page 4.
	The instructions for questions 49-51, which relate to assets, have been revised to include Education IRAs.
	The instructions at the top of page 4 have been revised to direct separated applicants to ignore references to "spouse."
	Telefile tax line references have been added to all income fields.
Step Three	The order of the six dependency status questions (54-59) on page 4 has been altered.
	Telefile tax line references have been added to all income fields.
Step Four	The new FAFSA asks for both parents' Social Security Numbers and last names (questions 61-64) on page 5.
	The instructions for question 66, related to the number of people in college, have been revised to exclude parents.
	The instructions for questions 83-85, which relate to assets, have been revised to include Education IRAs.
	Telefile tax line references have been added to all income fields.
Step Five	Questions about household size and number in college have been moved to page 6.
	The instructions for question 87, related to the number of people in college, have been revised to exclude parents.
Step Six	The responses to housing plan questions (89, 91, 93, 95, 97, and 99) have changed from bubble responses to code boxes (page 6).
Step Seven	The Secretary of Education now has the authority to verify income reported on the FAFSA with the IRS. Notice of this authority has been inserted in the certification language on page 6.
Worksheet A	On page 8, specific "Box 13 Codes" have been added to the Worksheet A item, "Payments to tax-deferred pension and savings plans (paid direct or withheld from earnings) as reported on the W-2 Form. Include untaxed portions of 401(k) and 403(b) plans."
	The "Cash or money paid on your behalf" item on Worksheet A (page 8) has been clarified.
Worksheet B	The "AmeriCorps" item in worksheet B has been clarified (page 8).

The FAFSA for 2000-2001 is pink and purple. Students fill out the pink portion, while parents complete the purple portion.

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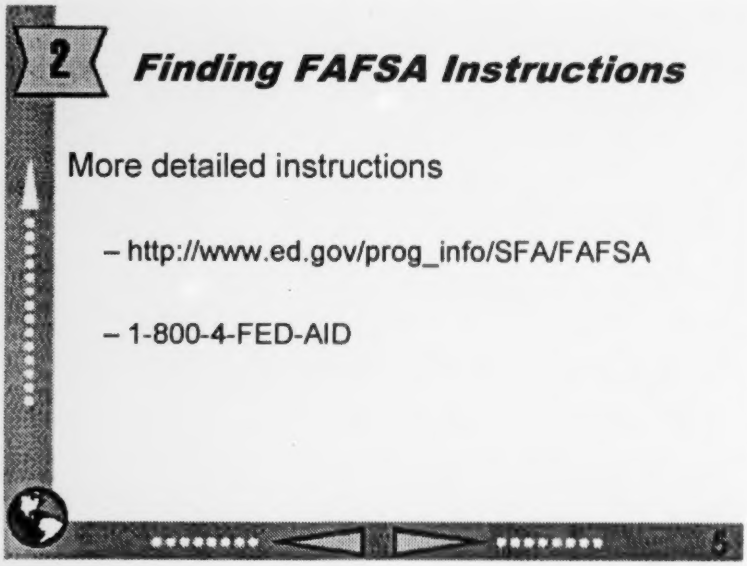

Finding FAFSA Instructions

More detailed instructions

- http://www.ed.gov/prog_info/SFA/FAFSA
- 1-800-4-FED-AID

Reviewing the FAFSA

INSTRUCTIONS

Common Questions About the FAFSA

Page 1-Instructions

Question 1: After I complete this form will I know whether or not my parents are eligible for a Hope or Lifetime Learning tax credit?

Answer: *No. The FAFSA is not used as an application for the Hope or Lifetime Learning tax credit. Your parents can claim this credit when they file their federal taxes. For more information on the Hope and Lifetime Learning credits, and other tax benefits for postsecondary students, see the IRS's Publication 970. You can get a copy of Publication 970 by calling 1-800-829-3676 or accessing the document at http://www.irs.ustreas.gov (The Department of Education also puts out a guide on these benefits, which will be discussed in Session 6.)*

Question 2: My mother just got laid off by her company. The instructions say I should contact my financial aid office when there is a loss of employment. I'm not sure what college I'll be attending. Should I wait to fill out this application until I know for certain where I'm going?

Answer: *No. You should fill out the form now and not wait. Later, contact the financial aid office and explain to them your family's unusual circumstances.*

Question 3: Will I have to fill this form out again next year?

Answer: *Not exactly. You'll need to complete some type of FAFSA each year you're in school. Next year you might be able to fill out a Renewal FAFSA. The Renewal FAFSA is a bit easier than this one. It shows what you reported this year, and all you have to do is update what has changed. A paper Renewal Application may be mailed to you, or you can use the Renewal FAFSA on the Web.*

Question 4: My counselor gave me this form last week and I'd like to mail it in before I go on vacation on December 18. Can I do that?

Answer: *No. Your FAFSA won't be processed. In fact it will be mailed back to you. Wait until January 1, 2000 to mail your paper FAFSA or transmit your electronic FAFSA. (In 2000, the electronic FAFSA will not be available until January 3, 2000.)*

Record other questions students might ask about instructions on page 1.

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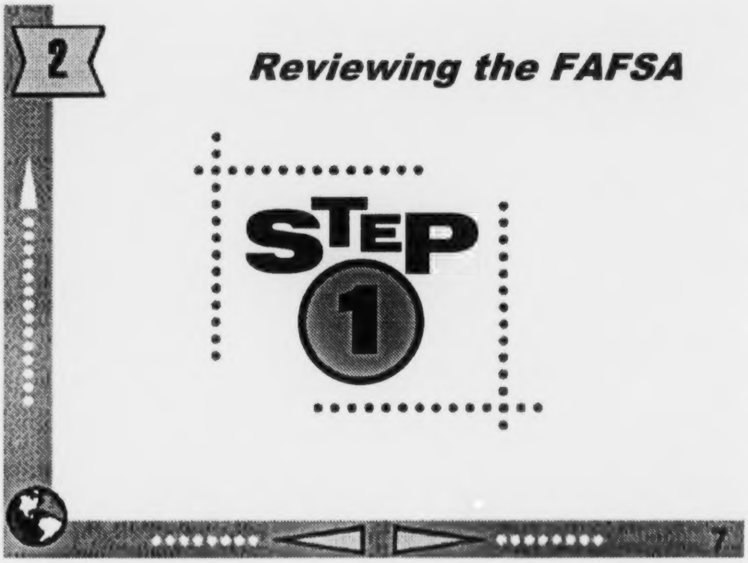
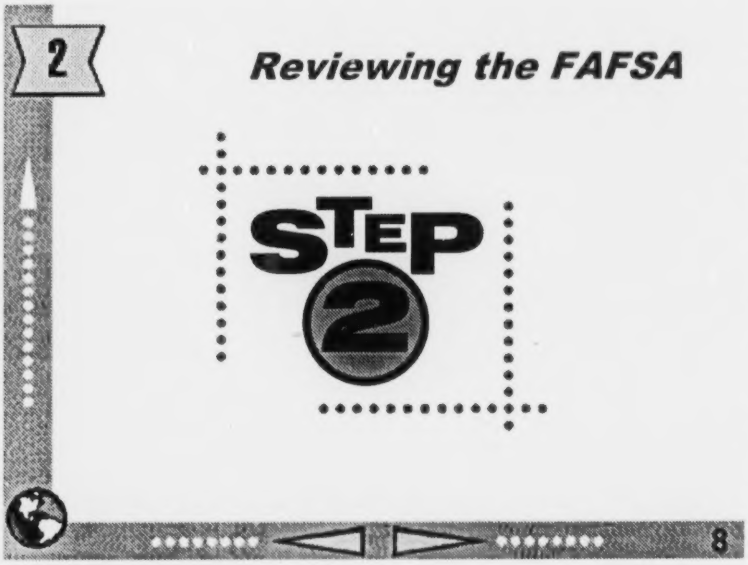


Reviewing the FAFSA

STEP 1

Questions 29 and 30 on the FAFSA deal with Selective Service registration. Males between the ages of 18 and 25 must register for Selective Service to be eligible for federal student aid. While they may do so while filling out the FAFSA, they can also register on-line at http://www.sss.gov.



Reviewing the FAFSA

STEP 2

Common Questions About the FAFSA

Steps One and Two

Question 5: I have an alien registration number, but I just became a U.S. citizen. How do I answer Question 14?

Answer: *Select "a. Yes, I am a U.S. citizen". Do not select "b. No, but I am an eligible noncitizen." Do not provide your alien registration number in question 15. A person who has attained citizenship no longer uses an alien registration number and must inform the Social Security Administration.*

Question 6: Why do I need to tell you the highest school my parents attended in questions 23 and 24? I haven't seen my father for several years.

Answer: *Questions 23 and 24 are optional and have no effect on federal financial aid. However, a few state agencies (California, for example) use this information to award state grants and scholarships. If you don't know the answer, select "Other/unknown".*

Question 7: I'm not sure what they mean by "state of legal residence" (Question 25). Is it where my parents and I live now or where I'll be going to school?

Answer: *It's where you and your parents live now. The student's state of legal residence is used to determine if you are eligible for financial aid from a state agency and is used in the EFC formula to set an allowance for state taxes.*

Question 8: I haven't decided on a major. What should I enter for question 31?

Answer: *If you don't know yet, enter 9 for "other/undecided." This question is optional and has no effect on federal financial aid.*

Question 9: I'm not sure yet if I want to take out a student loan. What should I enter for question 35?

Answer: *Select "Yes." if you will consider taking out a loan. Most students do take out student loans. You can change your mind later. Some schools use this information to help them put together a "financial aid package" for you. Do the same thing for question 36. If you will consider work-study, enter the oval for "Yes." You can change your mind later.*

Question 10: I'll be filing a tax return this year because I worked part-time and I want to get my refund. However, I probably won't get around to doing my tax return until April. What do I put in questions 38 through 45? Should I wait to fill this form out until after I filed?

Answer: *Ideally, you should complete the FAFSA after you've done your tax return. But don't wait until April. Many colleges award institutional aid on a first-come, first-served basis. Also, you may not be eligible for state aid if you wait until April to submit the FAFSA. (The deadline dates for state aid are on the front page of the FAFSA.) Complete your FAFSA now and for question 37 fill in the oval for "b. I will file, but I have not yet filed." Answer questions 39 through 45 as best you can. Keep in mind, though, that you may have to provide your college with a copy of your completed tax return before you receive federal financial aid. If your estimate of what you earned is off the mark, you will have to make corrections later.*

Question 11: If I answer "2" for question 28, will I still be eligible for federal aid? What if I leave it blank?

Answer: *A "2" response to question 28 will not cause a rejected student aid report (SAR). However, when the student gets the SAR, there will be a comment, and the student will be ineligible for federal aid. A worksheet will also be on the SAR for the student to complete to determine whether or not they can become eligible for federal aid. Any student who leaves this question blank will also get a comment on their SAR, and will have to complete the worksheet that will appear on their SAR. Additional assistance about this question is available at http://www.ed.gov/q28, or by calling 1-800-4-FED-AID.*

Record other questions students might ask about Steps One and Two.

Notes

Reviewing the FAFSA

Common Questions About the FAFSA

Step Three

Question 12: I'm going to get married this summer. How do I answer question 56?

Answer: *Answer "Yes" if you are married before the day you sign the FAFSA. Otherwise, answer "No." The FAFSA is a snapshot of your status on the day it was signed and does not forecast changes, such as marriages.*

Question 13: I have a child who doesn't live with me. She lives with my parents. How should I answer question 57?

Answer: *Answer "Yes" if you provide more than half of the child's support, even if the child lives with your parents. For example, you might be providing your parents with money for the child's food, clothing, and daycare. However, answer "No" if your parents provide more than one half of the child's support.*

Question 14: I'm a member of the National Guard. Can I answer "Yes" to question 59, "Are you a veteran of the U.S. Armed Forces?"

Answer: *Answer "No" if you have never been activated for duty. To be considered a veteran for federal financial aid purposes, you must have served on active duty for some reason other than training, and you must have been discharged from active duty under other than dishonorable conditions.*

Question 15: I'm considered an emancipated minor. Do I have to provide my parents' information in Step Four?

Answer: *The status of emancipated minor isn't recognized by the U.S. Department of Education for financial aid purposes. However, ward of the court is recognized. If you were considered a ward of the court at the age of 18, you should answer "Yes" to question 58. When you answer "Yes" to this question you are considered "independent" and don't have to provide your parents' information.*

Record other questions students might ask about Step Three.

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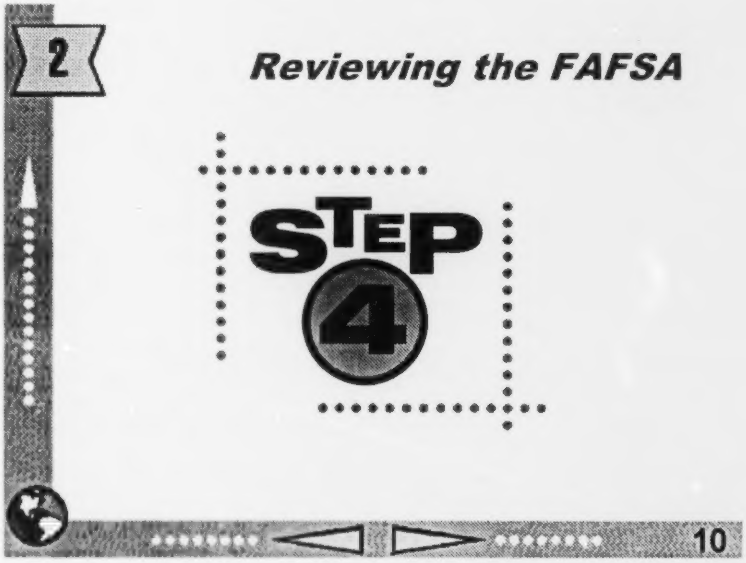
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Reviewing the FAFSA

STEP 4

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Step Four

Step Four asks questions about the student's parents. Defining "parent" can sometimes present a challenge. There is a good definition in the *High School Couselor's Handbook*. Here are some points to remember about the definition of "parent."

- It is important to understand that the term "parent" is not restricted to a student's biological parents. There are several instances in which a person other than a student's biological parent is treated as the student's parent. For the purposes of completing a FAFSA, a "parent" could be an adoptive or stepparent as well. A legal guardian is not considered a parent.
- An adoptive parent is treated in the same manner as a natural parent. A stepparent's information is reported if, as of the date the FAFSA is signed, the stepparent is married to the parent whose information will be reported on the FAFSA, or if the stepparent has legally adopted the student. There are no exceptions.
- In cases of death, separation, or divorce, a student must answer the parental questions on the FAFSA as they apply to the surviving or responsible parent. If one parent has died, the student would answer the parental questions on the basis of only the surviving parent's financial information. If the last surviving parent dies after the FAFSA has been filed, the student would update their dependency status on the SAR and remove all parent financial information.

- A student whose parents are separated or divorced should report the information of the parent that the student has lived with the most during the past 12 months. It does not make a difference who claims the student as an exemption for tax purposes. If the student did not live with either parent or lived exactly equally with each parent, then the parental and household information must be provided for the parent from whom the student received the most financial support during the last 12 months or during the most recent calendar year that the student was actually supported by a parent.

Common Questions About the FAFSA

Step Four

Question 16: My mother and father divorced two years ago. I've been living mostly with my mother. Every other weekend I spend at my father's house. My mother hasn't gotten remarried. Do I need to report my father's income?

Answer: *No. You provide only your mother's income information since you have been living with her the most during the past twelve months.*

Question 17: I live with my grandparents because my mother can't afford to support me. My father died when I was six years old and my mother hasn't gotten married again. Whose information do I put on the FAFSA?

Answer: *Report your mother's income and asset information.*

Question 18: My parents got divorced a long time ago. My mother remarried two years ago. I live with my mother and my stepfather. My stepfather says that I should put my biological father's information on the FAFSA, not his. Is he right?

Answer: *No. Your biological father's information shouldn't be reported. Report your mother and stepfather's information since you live with them.*

Notes

Question 19:	My parents got separated four months ago. I live with my mother and my father lives in another city. They filed a joint tax return this year and claimed me as an exemption. Do I report both their incomes, or just my mother's?
Answer:	*Report only your mother's income and asset information because you lived with her the most during the past twelve months. Use a W-2 form or some other document that shows your mother's share of the income reported on the tax return.*
Question 20:	My mother's W-2 form says that she had $1,114 of taxes withheld during 1999. Is this the number you're looking for in question 75?
Answer:	*No. We are looking for the amount of income tax she actually paid, as reported on her IRS tax return. If she owed money when she filed, the amount reported for question 75 would be greater than $1,114; if she got a refund, the figure will be less than $1,114.*
Question 21:	My father says that his company contributes money each year to his retirement fund. Do these payments have to be reported anywhere?
Answer:	*No. Only employee contributions to your parents' tax deferred pension and retirement plan are reported in question 80. These include untaxed portions of 401(k) and 403(b) plans. Make sure to complete Worksheet A on page 8, including these payments with other sources of untaxed income in question 80.*
Question 22:	My grandmother lives with our family and receives a Social Security benefits check each month. Do we have to report the benefits she receives?
Answer:	*No. If she is receiving the benefits in her own name then those benefits do not need to be reported. Remember, though, that your grandmother cannot be included in the household size (question 65) if your parents do not provide her with more than one half of her support.*

Question 23: My mother gets food stamps each month. Where do I report them?

Answer: *You don't need to report food stamps. Food stamps are considered in-kind assistance and are not included as untaxed income or benefits on the FAFSA.*

Question 24: My father attends the community college in our area and last year earned work-study money. Where does this income get reported?

Answer: *Include the amount he earned in question 74 (adjusted gross income) and question 78 (father's earnings from work). If the earnings from his work-study job were part of a financial aid package, enter the amount in question 81 (the total from Worksheet B). Complete Worksheet B (on page 8) to find out if other income and benefits should be included in question 81.*

Question 25: My brother is 28 years old and still lives with us. Do we count him in the number in my parents' household (question 65)?

Answer: *Include your brother if he receives more than half his support from your parents and will continue to receive more than half his support during the upcoming year (from July 1, 2000 through June 30, 2001).*

Question 26: I just reported a size of household of 4 in question 65. Is the answer the same for question 76 (parents' tax exemptions)?

Answer: *Not necessarily. The number of tax exemptions can be different than the number that is required in question 65. One difference is that tax exemptions look at the size of the household in the previous year (1999). Question 65 asks for the size of the household in the upcoming year (from July 1, 2000 through June 30, 2001). Read the definition on page 7 to determine how many people to include.*

Notes

Question 27: My mother goes to college part-time at the local community college. Do we include her in the number we enter for question 66?

Answer: *Prior to the 2000-2001 school year, you would include her if she was going at least half-time (taking at least 6 credit hours per term or 12 clock hours per week); she was working towards a degree or certificate; and her school was eligible to participate in the federal student aid programs. However, as a result of a change in the Higher Education Act that took effect in 1999, parents are excluded from the number of college students in the household.*

Question 28: I am entering financial information for my mother and stepfather on the form. For question 61, should I enter my father's Social Security Number and last name, or my stepfather's?

Answer: *You should provide the Social Security Number and last name of the same person or people for whom you are reporting financial information.*

2

Reviewing the FAFSA

STEP 5

11

Notes

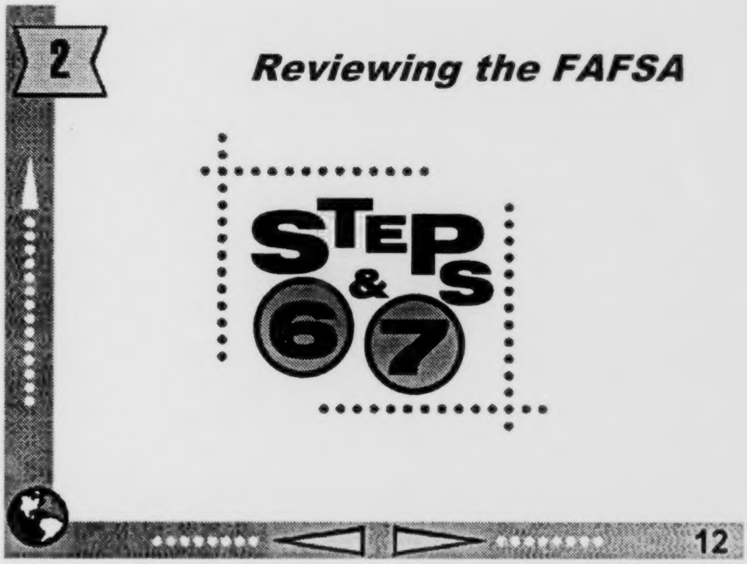
Common Questions About the FAFSA

Step Five

Question 29: I'm expecting a child this summer. Do I include the child in the number of people I give for an answer to question 86?

Answer: *Yes, include the unborn child if you will provide more than half of the child's support from the projected date of birth until the end of the award year (June 30, 2001).*

Notes



Reviewing the FAFSA

STEPS 6 & 7

While students are not required to put federal school codes on the FAFSA, the application will be processed faster if they are provided. These codes are provided in the Federal School Code List, which ED sends to high schools, colleges, and public libraries each fall—around the same time FAFSAs are distributed. You and your students can also view this list at *http://www.ed.gov/studentaid*. Once at this web site, you would click on "Federal School Codes." If a school's code is not available, the student must write in the complete name, address, city, and state of the school.

Common Questions About the FAFSA

Steps Six and Seven

Question 30: I'm considering several schools and need to list them in Step 6. Does it matter which school I list first?

Answer: *No. It does not matter for federal aid. All schools listed will receive your application results. However, some states consider students for aid if the first school listed on the FAFSA is located in that state—California, for example. The Department of Education does not condone this policy.*

Question 31: I'm considering eight schools and the FAFSA allows me to only enter six. How do I get my information to the other two?

Answer: *When you get the results of your FAFSA in the mail, make copies and send them to the two schools you weren't able to report on the FAFSA. (Note that a photocopy of the SAR does not serve as final documentation of eligibility.) You can also call 1-800-4FED-AID and use the DRN to add new schools.*

Question 32: I don't know my housing plans yet. What should I enter?

Answer: *Leave it blank if you're not sure. This information is used by some schools to determine cost of attendance. However, if you leave this field blank, most schools will assume that you live at your parents' address.*

Question 33: My parents are out of the country now. Do I really need their signature?

Answer: *Yes. If they can be contacted for a signature (for example, by mail) then you need to make an effort to have them sign the FAFSA. Your high school counselor or financial aid administrator can sign the application for your parents only if:*

- *They can't be contacted by normal means*
- *You don't know their address*
- *They are physically or mentally incapable of providing a signature*

Question 34: My high school counselor told me how to fill out this application. Do I need to provide his information in questions 102, 103, and 104?

Answer: *If the counselor actually filled out line items for you or dictated answers to items on the form, then you need to provide his information. If he simply answered questions you had about filling out the form, then you don't need to provide his information.*

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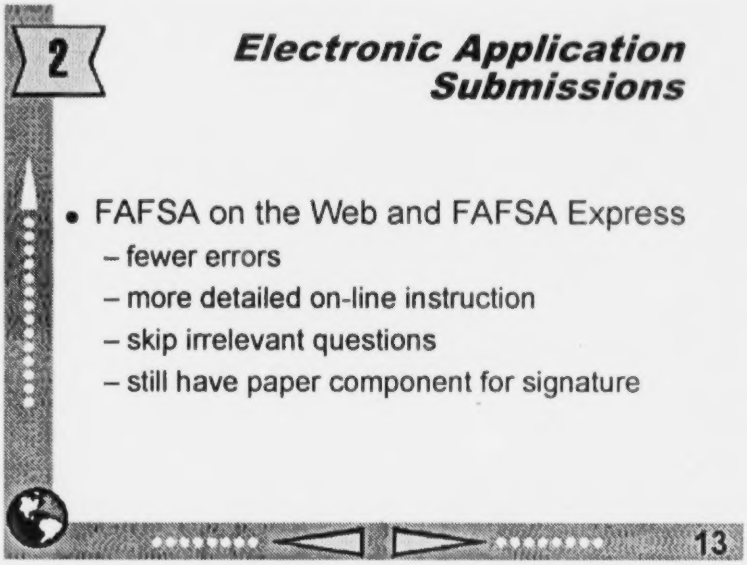
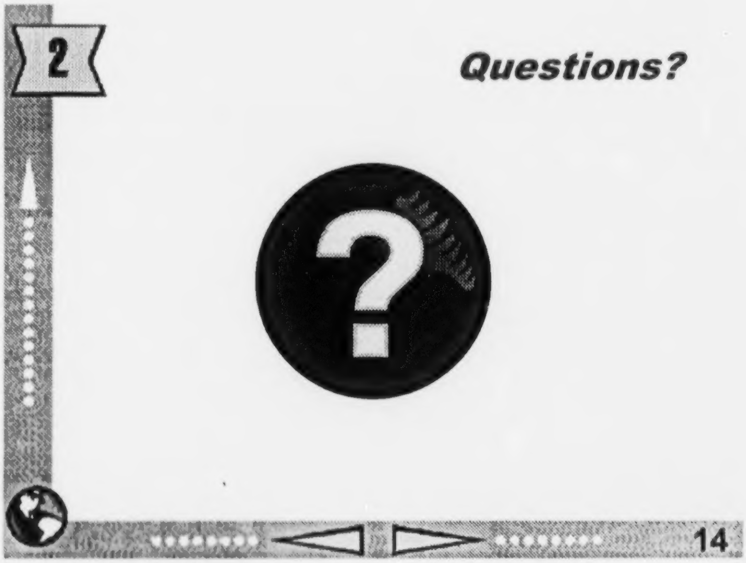


Electronic Application Submissions

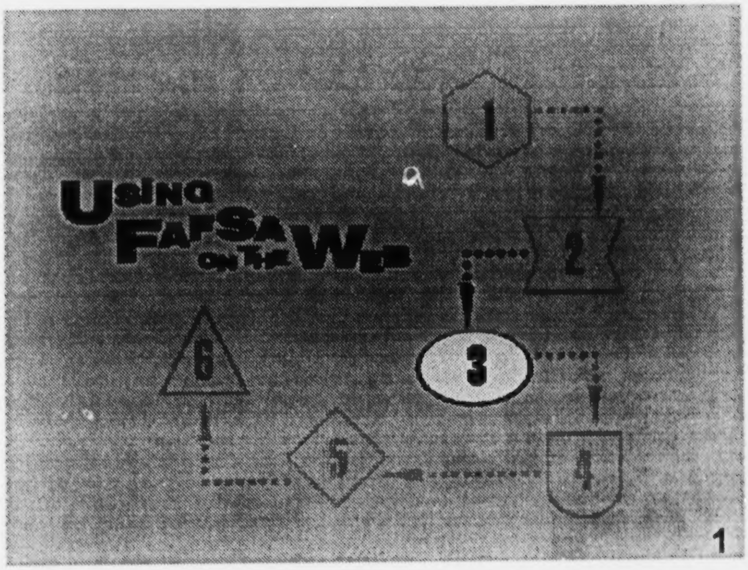
- FAFSA on the Web and FAFSA Express
  - fewer errors
  - more detailed on-line instruction
  - skip irrelevant questions
  - still have paper component for signature

FAFSA Express is software that must be installed on a personal computer. The PC must run Microsoft Windows 3.0 or higher. FAFSA Express does not run on a Macintosh operating system. The PC must also have a working modem. FAFSA Express is available on diskette by calling 1-800-801-0576 and can be downloaded from the Internet at *http://www.ed.gov/offices/OSFAP/Students/apply/fexpress.html*.



Questions?

USING FAFSA ON THE WEB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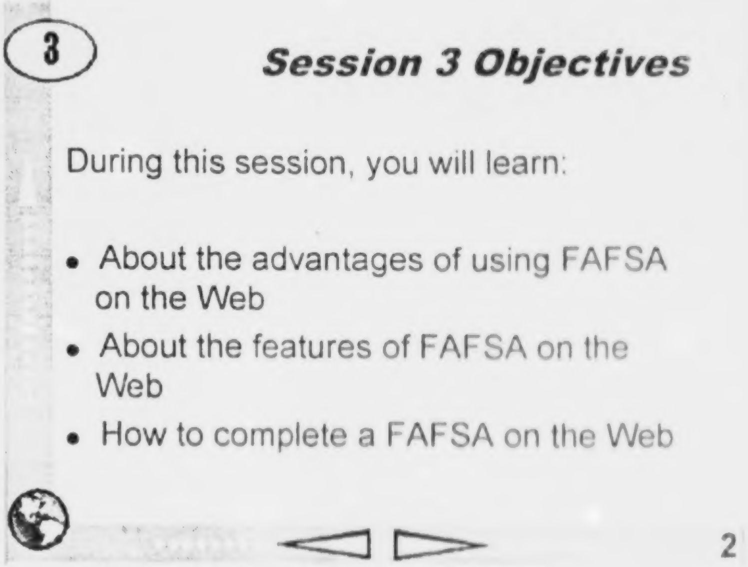
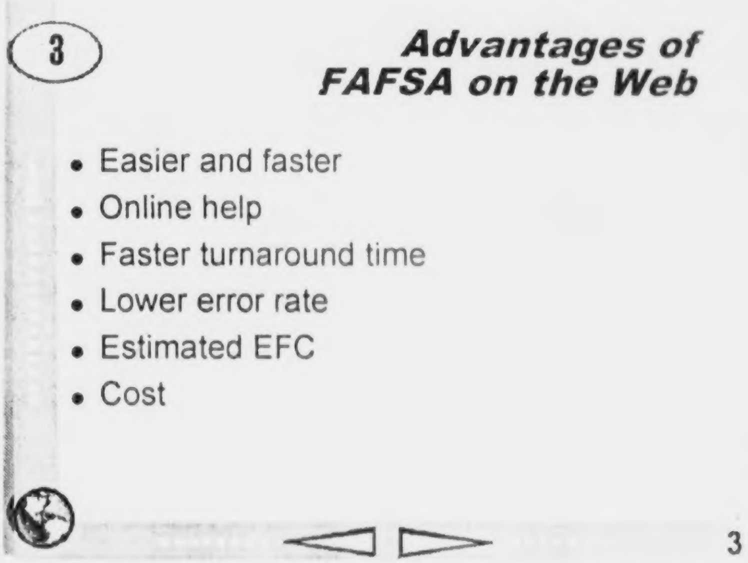


Session 3 Objectives

During this session, you will learn:

- About the advantages of using FAFSA on the Web
- About the features of FAFSA on the Web
- How to complete a FAFSA on the Web



Advantages of FAFSA on the Web

- Easier and faster
- Online help
- Faster turnaround time
- Lower error rate
- Estimated EFC
- Cost

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Notes

3

New Features

- Two formats
  - Interview
  - Form-based
- PIN for parents
- Web corrections

The FAFSA on the Web for 2000-2001 will give applicants the option of answering questions in an interview format or of answering questions as if they filled out the paper FAFSA. While both options allow students to submit their applications electronically, and both options will edit answers to ensure that the data entered makes sense, only the interview format has significant "skip logic." That is, if a student's answer to a question makes other questions irrelevant, FAFSA on the Web will automatically skip those questions. This is not true for the version of FAFSA on the Web that mirrors the paper application. Regardless of which format students use, FAFSA on the Web is available at http://www.fafsa.ed.gov.

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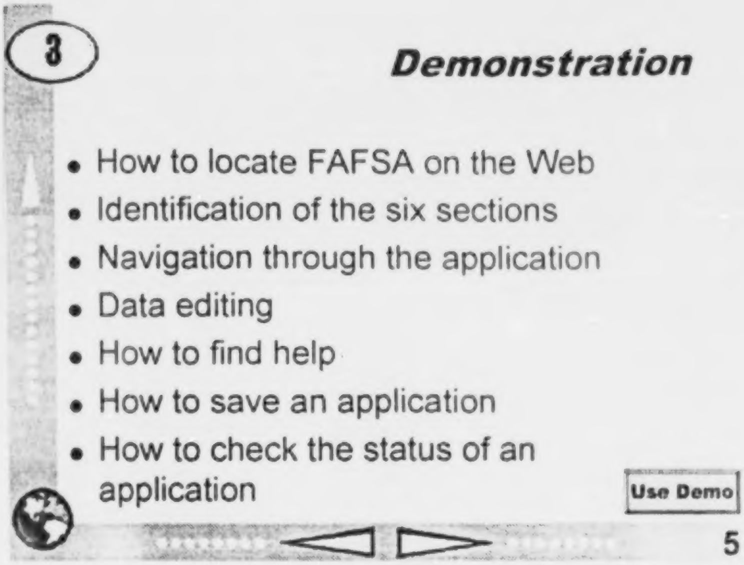

3

Demonstration

- How to locate FAFSA on the Web
- Identification of the six sections
- Navigation through the application
- Data editing
- How to find help
- How to save an application
- How to check the status of an application

The following browsers have been certified for use with FAFSA on the Web. If you choose to use a browser other than the ones listed here, you may encounter problems that Customer Service may not be able to resolve. On a quarterly basis, the Department of Education will evaluate new browser versions and certify them for use with FAFSA on the Web.

Netscape browsers:

Netscape Navigator 3.0 — 3.04 (Windows 3.1/95/98, Windows NT, and Macintosh)

Netscape Navigator 4.0 — 4.04 (Windows 3.1/95/98, and Windows NT)

Netscape Navigator 4.05 — 4.07 (Windows 3.1/95/98, Windows NT, and Macintosh)

Netscape Navigator 4.08 — 4.51 (Windows 95/98, Windows NT, and Macintosh)

Microsoft browsers:

Internet Explorer 4.0 and 4.01 with Service Pack 1 or 2 (Windows 95/98, and Windows NT)

Internet Explorer 5.0 (Windows 95/98, and Windows NT)

Demonstration

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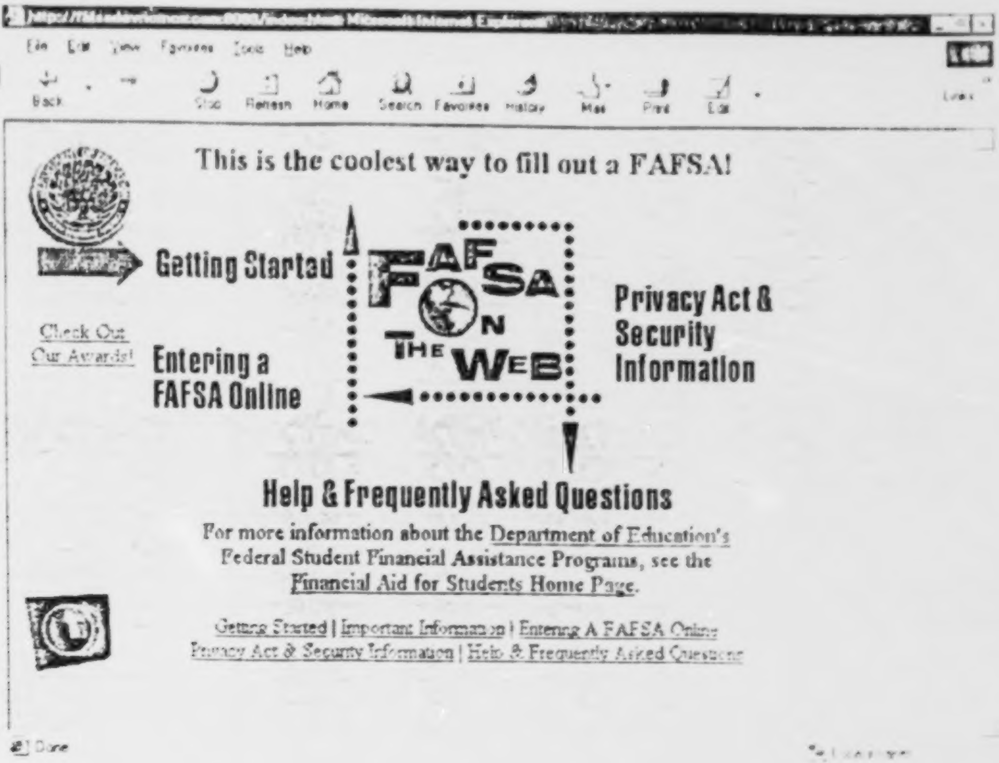

This is the coolest way to fill out a FAFSA!

Check Out Our Awards!

Getting Started

Entering a FAFSA Online

FAFSA ON THE WEB

Privacy Act & Security Information

Help & Frequently Asked Questions

For more information about the Department of Education's Federal Student Financial Assistance Programs, see the Financial Aid for Students Home Page.

Getting Started | Important Information | Entering A FAFSA Online
Privacy Act & Security Information | Help & Frequently Asked Questions

6

These are the seven general steps in filling out a FAFSA on the Web:

Step 1: Choose 2000-2001 FAFSA

Step 2: Complete the FAFSA

Step 3: After you finish, we will check your FAFSA for missing information and inconsistent answers

Step 4: Print and sign (and have your parents sign, if necessary) your signature page (optional, but highly recommended)

Step 5: Submit your FAFSA to the Department of Education through the Internet

Step 6: Receive and print your confirmation (optional)

Step 7: Mail your signature page to the Department of Education (optional)

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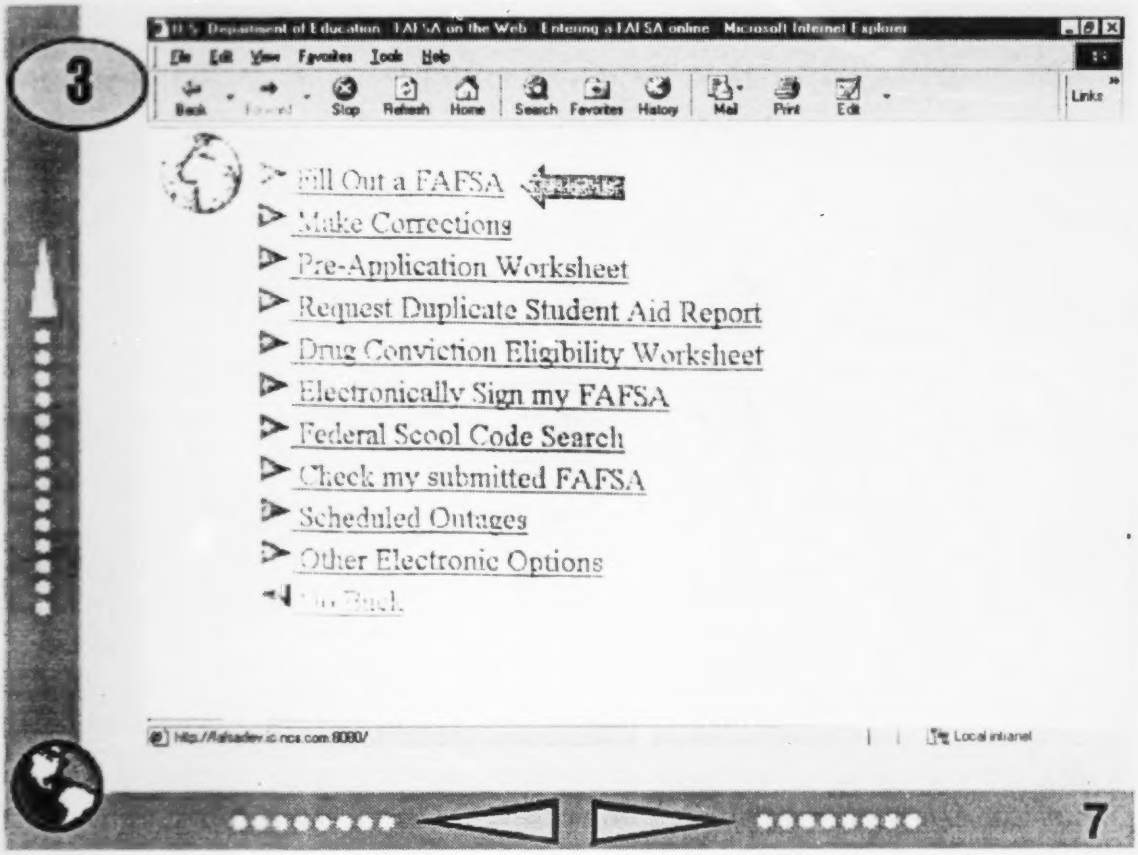
Notes

Fill Out A FAFSA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- Fill Out a FAFSA
- Make Corrections
- Pre-Application Worksheet
- Request Duplicate Student Aid Report
- Drug Conviction Eligibility Worksheet
- Electronically Sign my FAFSA
- Federal Scool Code Search
- Check my submitted FAFSA
- Scheduled Outages
- Other Electronic Options
- Go Back

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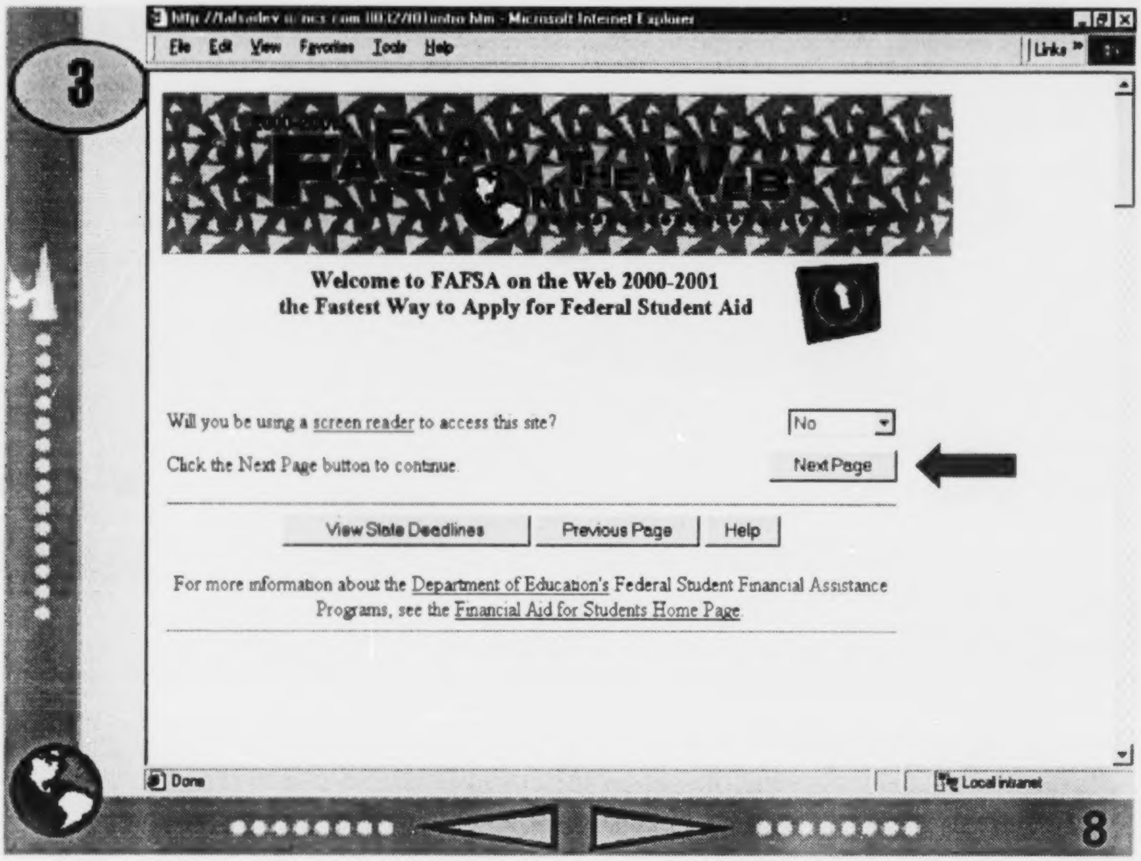
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Welcome to FAFSA on the Web 2000-2001
the Fastest Way to Apply for Federal Student Aid

Will you be using a screen reader to access this site? No

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View State Deadlines | Previous Page | Help

For more information about the Department of Education's Federal Student Financial Assistance Programs, see the Financial Aid for Students Home Page.

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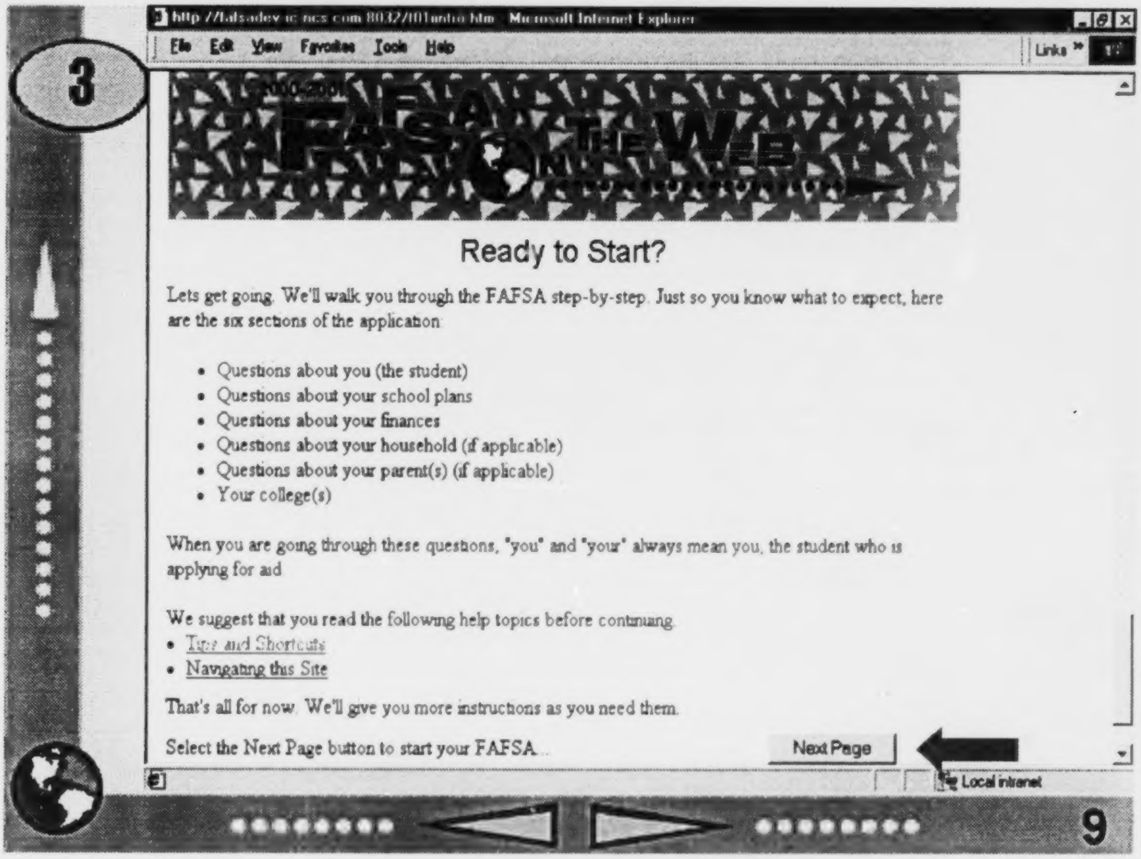
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Ready to Start?

Lets get going. We'll walk you through the FAFSA step-by-step. Just so you know what to expect, here are the six sections of the application:

- Questions about you (the student)
- Questions about your school plans
- Questions about your finances
- Questions about your household (if applicable)
- Questions about your parent(s) (if applicable)
- Your college(s)

When you are going through these questions, "you" and "your" always mean you, the student who is applying for aid.

We suggest that you read the following help topics before continuing.

- Tips and Shortcuts
- Navigating this Site

That's all for now. We'll give you more instructions as you need them.

Select the Next Page button to start your FAFSA...

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Section 1: About You

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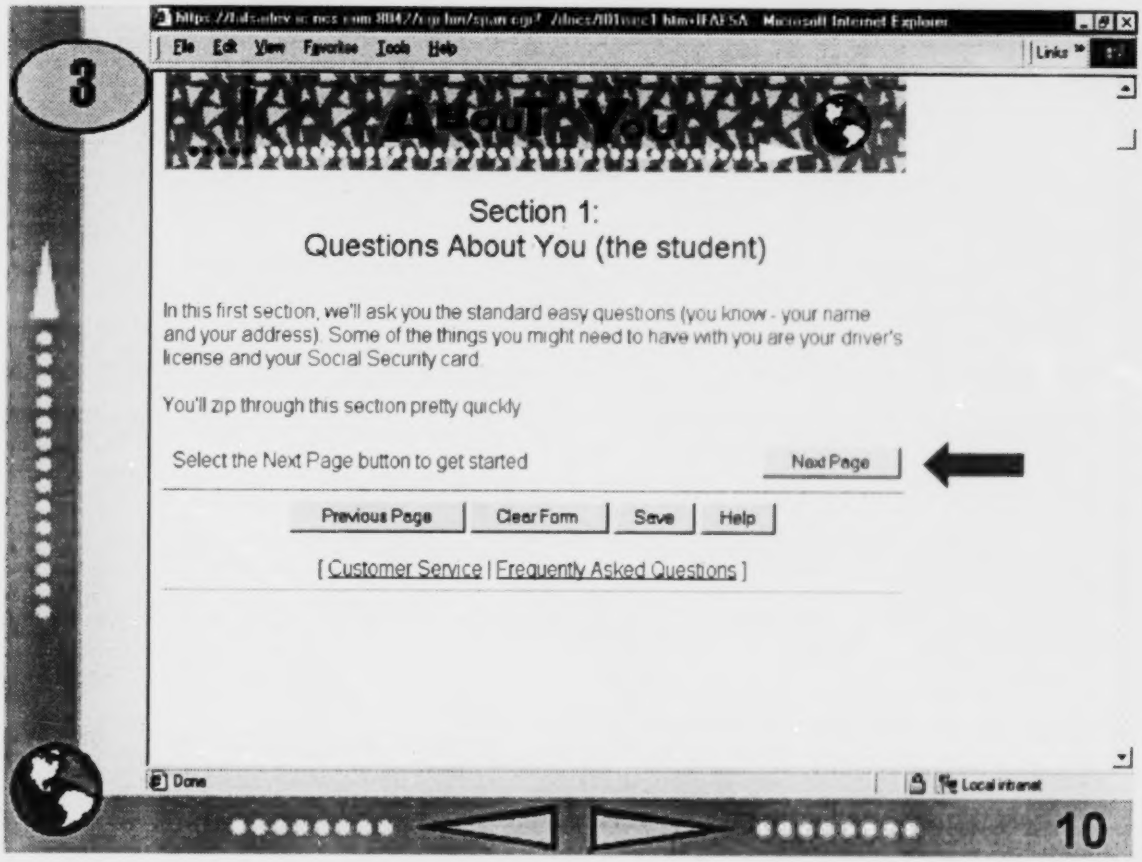
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Section 1:
Questions About You (the student)

In this first section, we'll ask you the standard easy questions (you know - your name and your address). Some of the things you might need to have with you are your driver's license and your Social Security card.

You'll zip through this section pretty quickly

Select the Next Page button to get started

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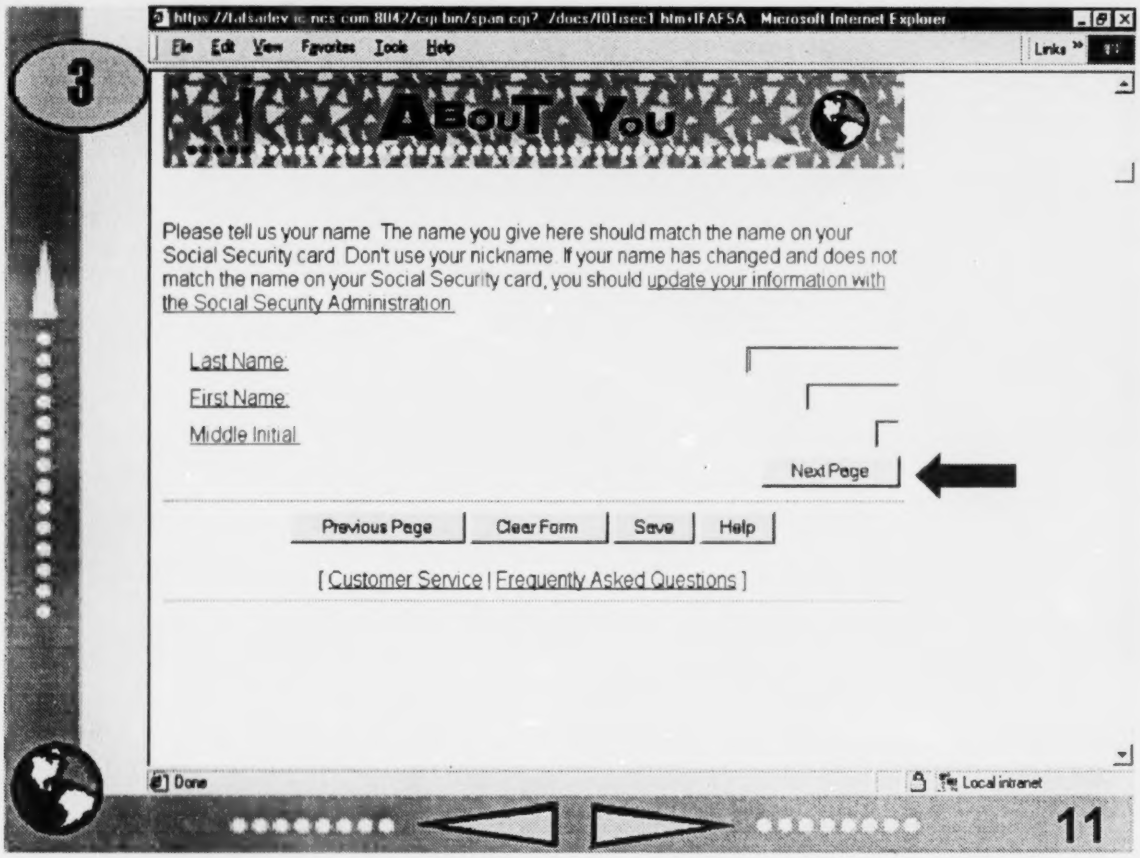

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Please tell us your name The name you give here should match the name on your Social Security card Don't use your nickname If your name has changed and does not match the name on your Social Security card, you should update your information with the Social Security Administration

Last Name:

First Name:

Middle Initial

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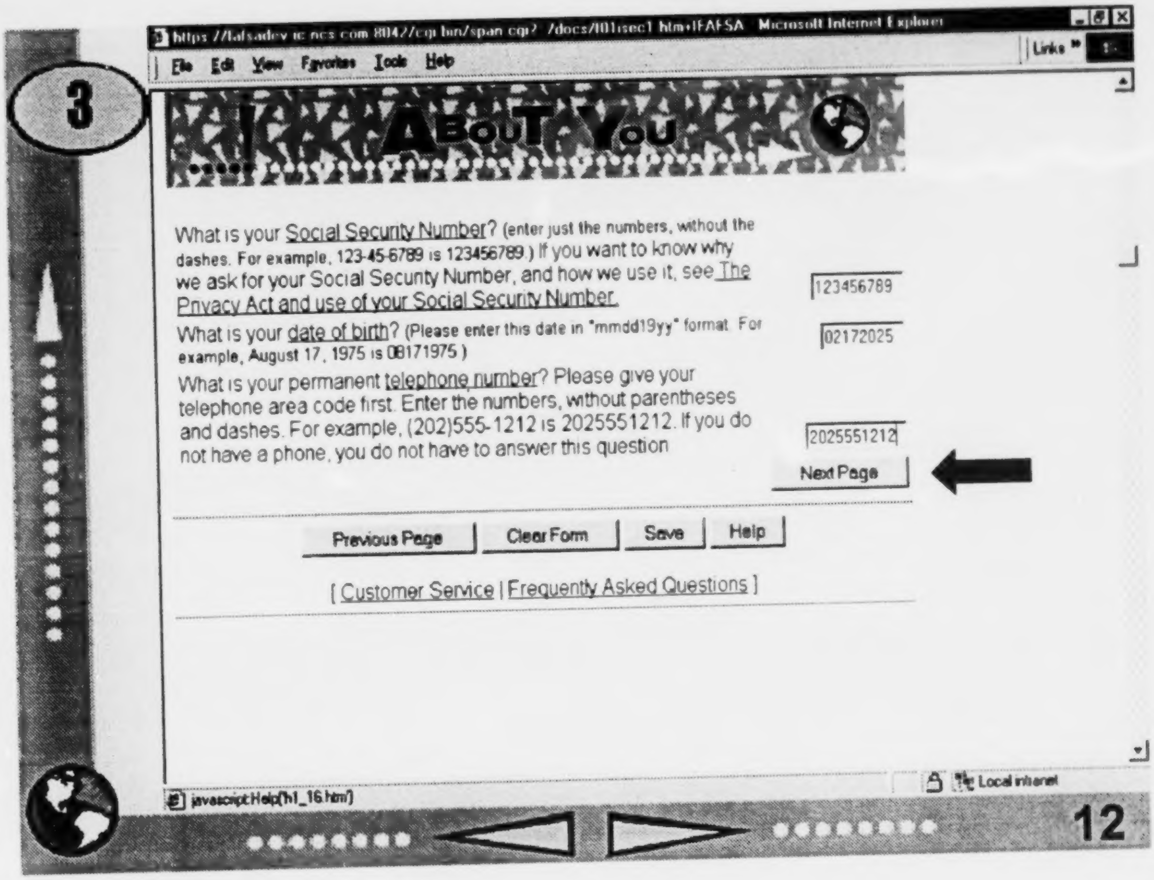
Notes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What is your Social Security Number? (enter just the numbers, without the dashes. For example, 123-45-6789 is 123456789.) If you want to know why we ask for your Social Security Number, and how we use it, see The Privacy Act and use of your Social Security Number. 123456789

What is your date of birth? (Please enter this date in "mmdd19yy" format. For example, August 17, 1975 is 08171975.) 02172025

What is your permanent telephone number? Please give your telephone area code first. Enter the numbers, without parentheses and dashes. For example, (202)555-1212 is 2025551212. If you do not have a phone, you do not have to answer this question 2025551212

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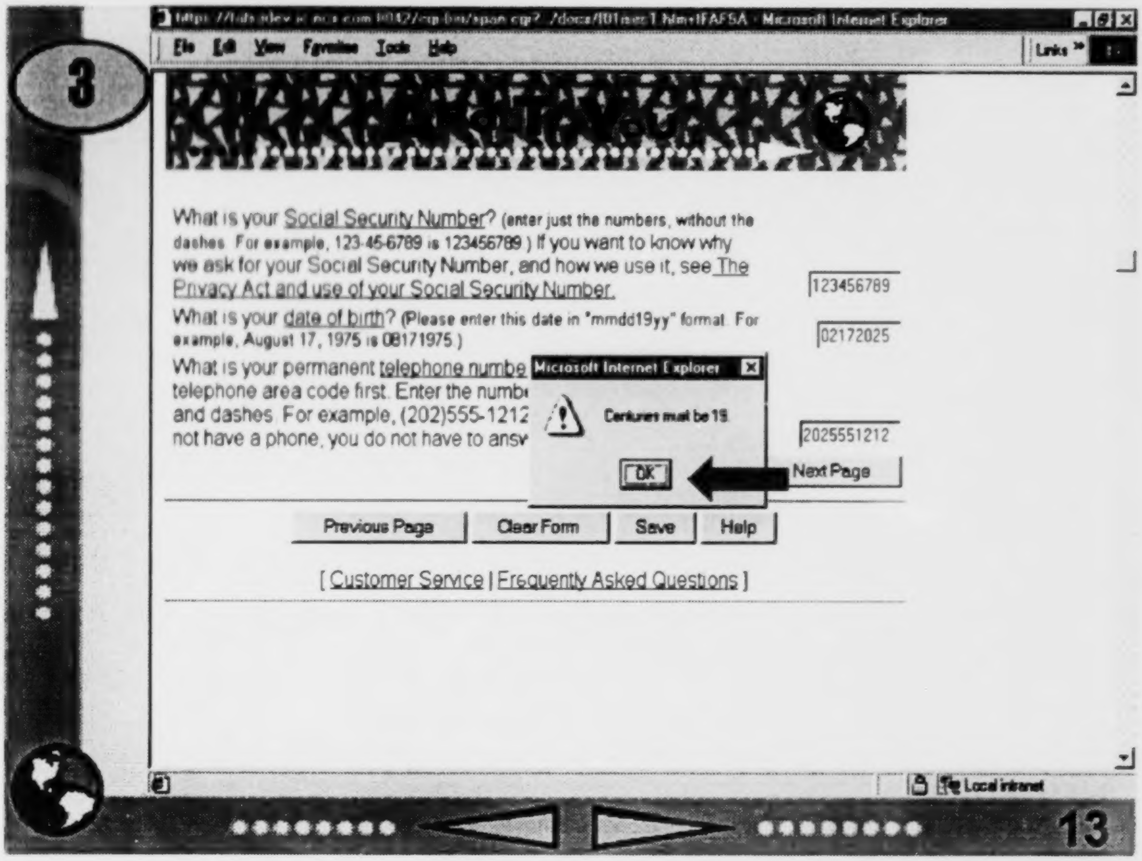

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What is your Social Security Number? (enter just the numbers, without the dashes. For example, 123-45-6789 is 123456789.) If you want to know why we ask for your Social Security Number, and how we use it, see The Privacy Act and use of your Social Security Number.

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What is your date of birth? (Please enter this date in "mmdd19yy" format. For example, August 17, 1975 is 08171975.)

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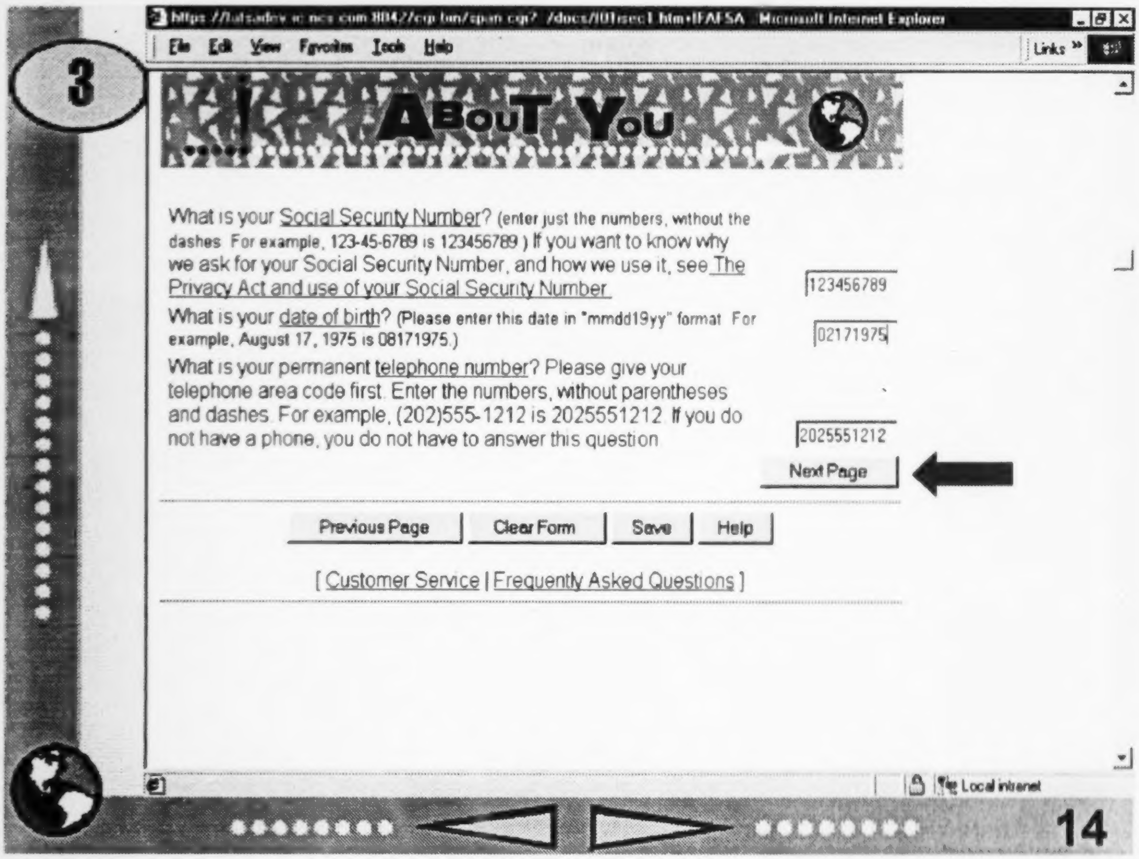
Data Editing

Notes

Before continuing to a new question, the software checks the answers just completed to see if there is any possible entry errors. If a value is not valid for a field, a box wil display with an error message such as the one displayed here.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What is your Social Security Number? (enter just the numbers, without the dashes. For example, 123-45-6789 is 123456789.) If you want to know why we ask for your Social Security Number, and how we use it, see The Privacy Act and use of your Social Security Number. 123456789

What is your date of birth? (Please enter this date in "mmdd19yy" format. For example, August 17, 1975 is 08171975.) 02171975

What is your permanent telephone number? Please give your telephone area code first. Enter the numbers, without parentheses and dashes. For example, (202)555-1212 is 2025551212. If you do not have a phone, you do not have to answer this question. 2025551212

[Customer Service | Frequently Asked Questions]

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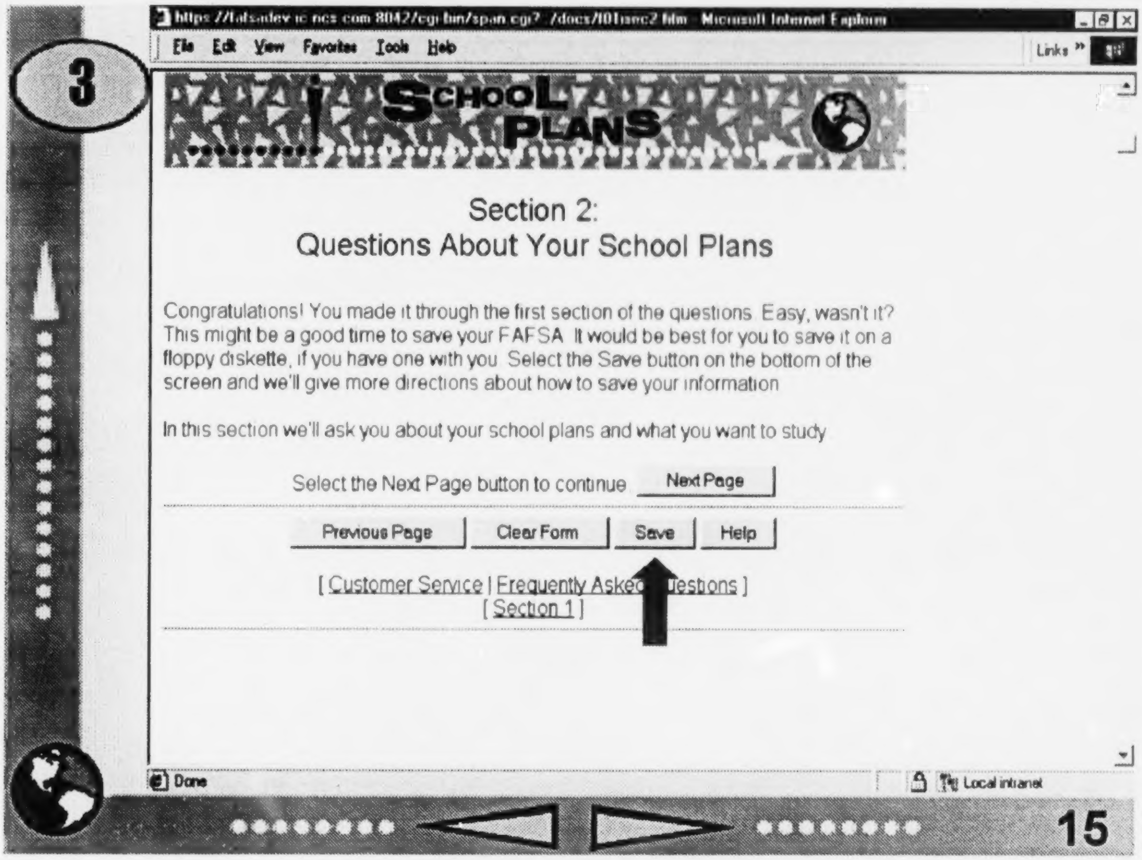
Section 2: School Plans



Section 2:
Questions About Your School Plans

Congratulations! You made it through the first section of the questions. Easy, wasn't it? This might be a good time to save your FAFSA. It would be best for you to save it on a floppy diskette, if you have one with you. Select the Save button on the bottom of the screen and we'll give more directions about how to save your information.

In this section we'll ask you about your school plans and what you want to study.

Select the Next Page button to continue Next Page

Previous Page | Clear Form | Save | Help

[Customer Service | Frequently Asked Questions]
[Section 1]

Saving an Application

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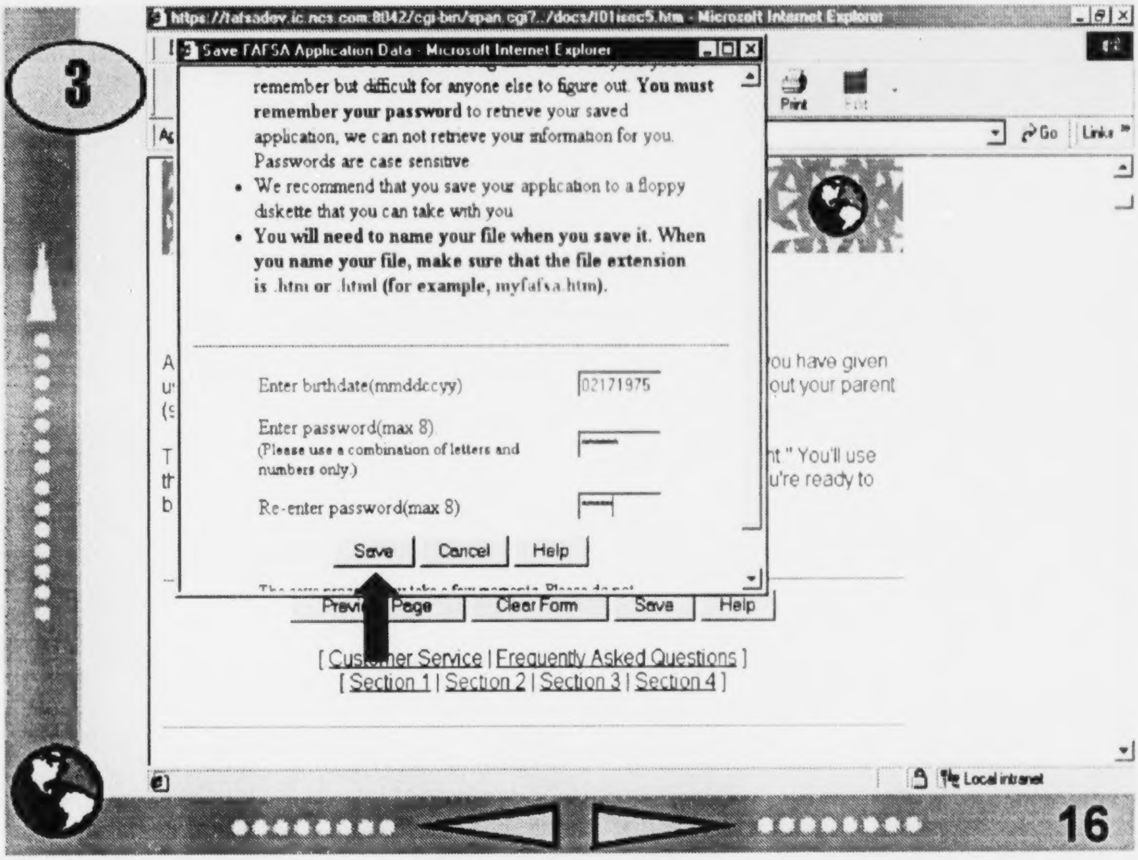
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[Section 1 | Section 2 | Section 3 | Section 4]
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remember but difficult for anyone else to figure out. **You must remember your password** to retrieve your saved application, we can not retrieve your information for you. Passwords are case sensitive

- We recommend that you save your application to a floppy diskette that you can take with you
- **You will need to name your file when you save it. When you name your file, make sure that the file extension is .htm or .html (for example, myfafsa.htm).**

Enter birthdate(mmddccyy) 02171975

Enter password(max 8) (Please use a combination of letters and numbers only.) ******

Re-enter password(max 8) ******

Save any portion of an incomplete application at any time by clicking the Save button provided on the entry screens.

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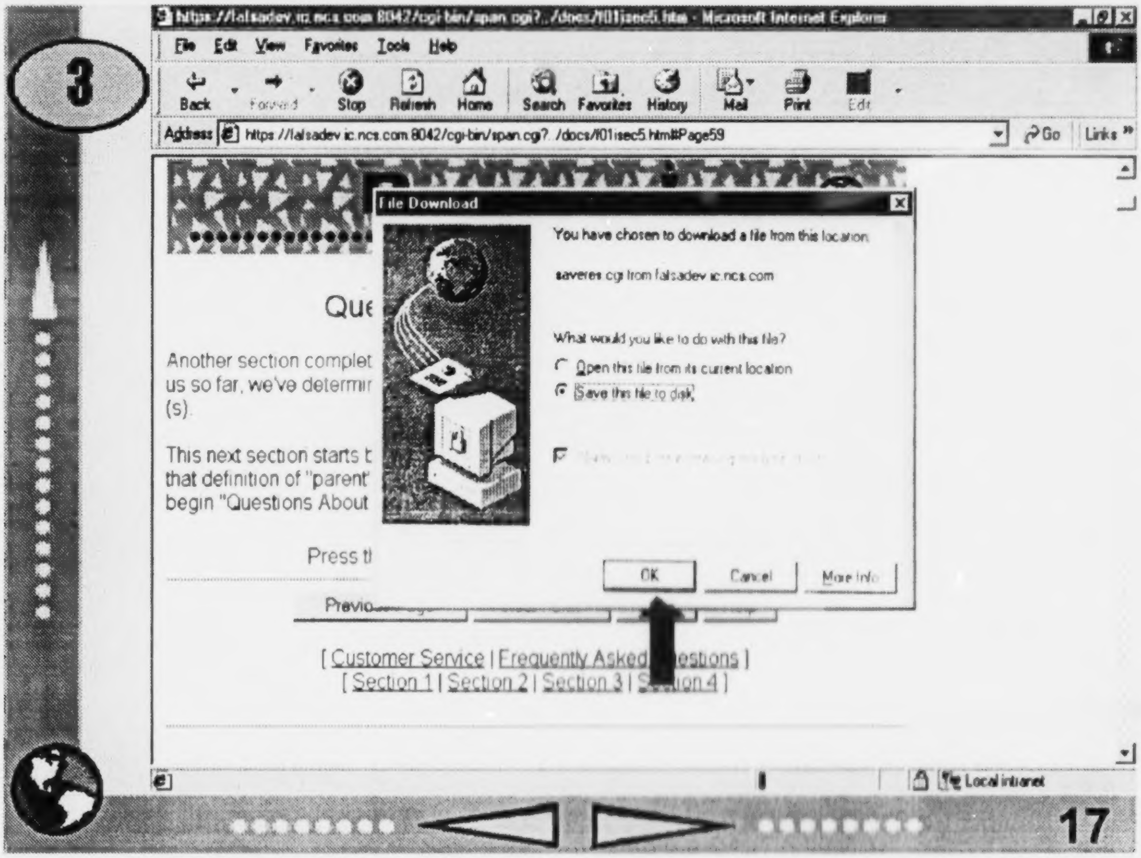
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What would you like to do with this file?

○ Open this file from its current location
● Save this file to disk

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OK Cancel More Info

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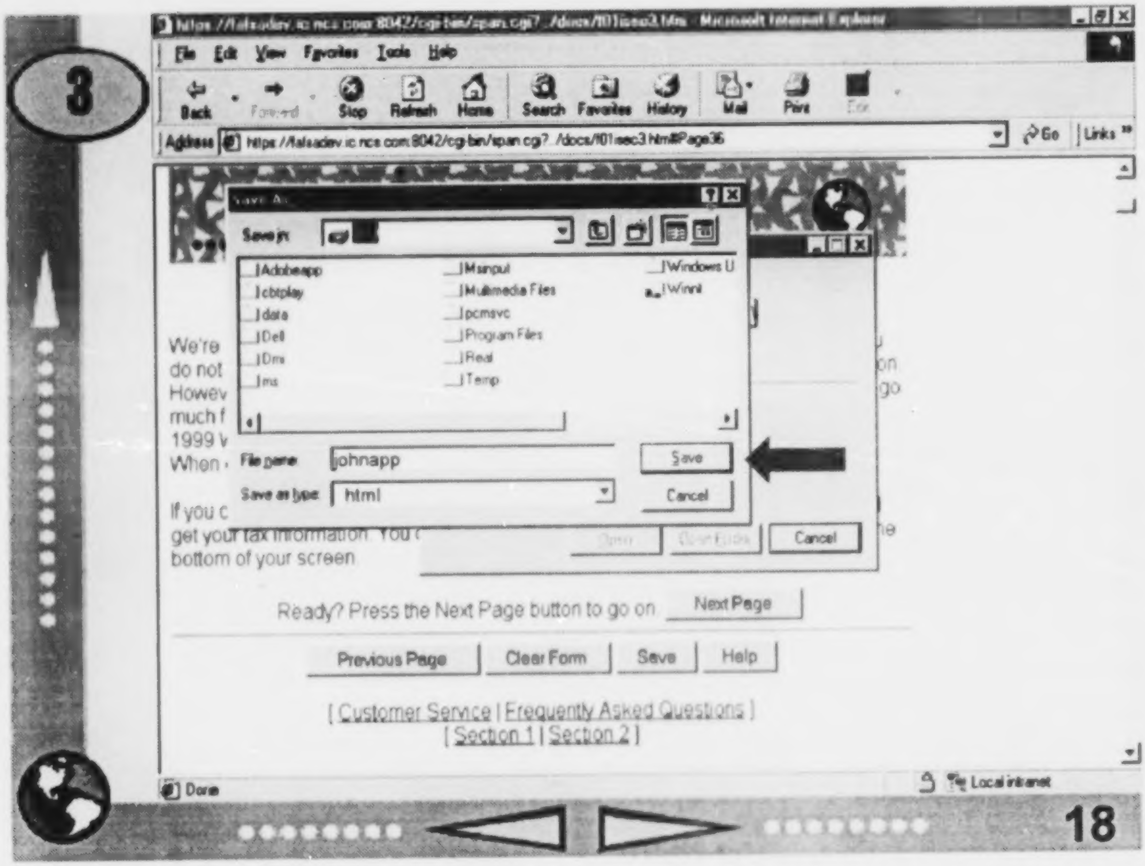
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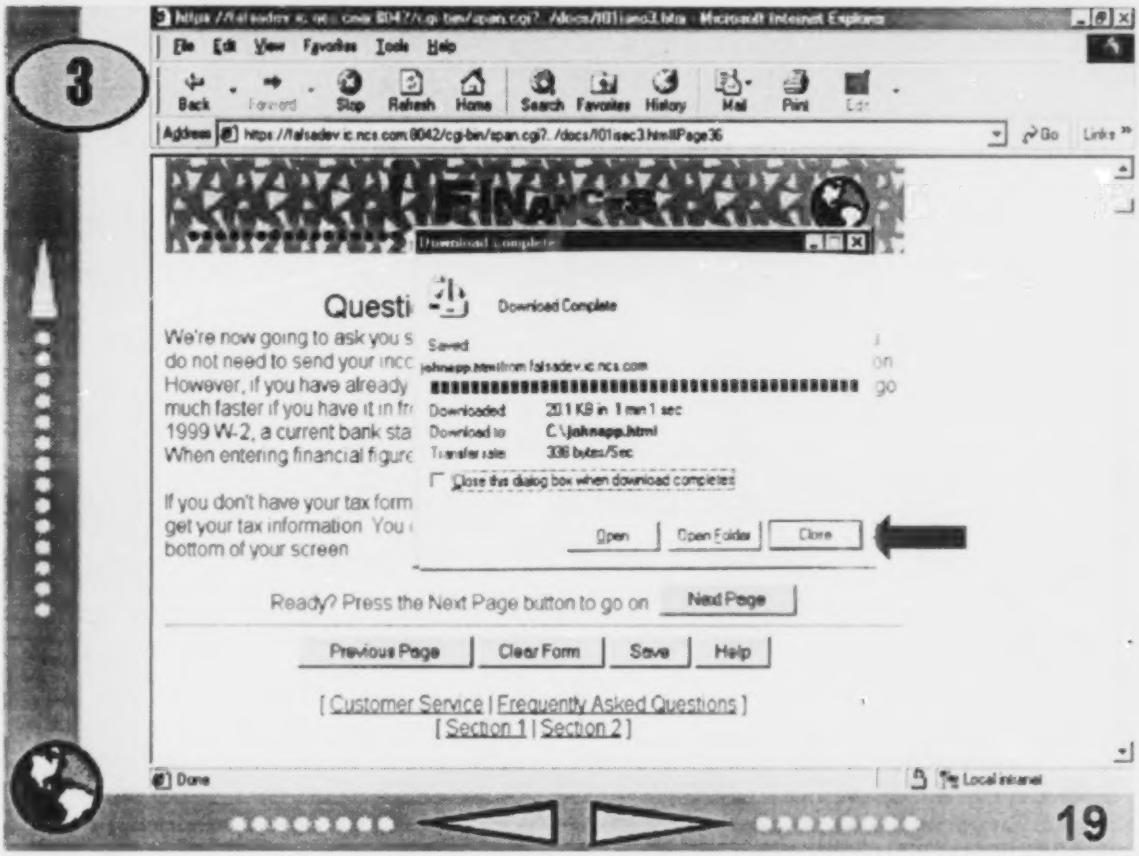
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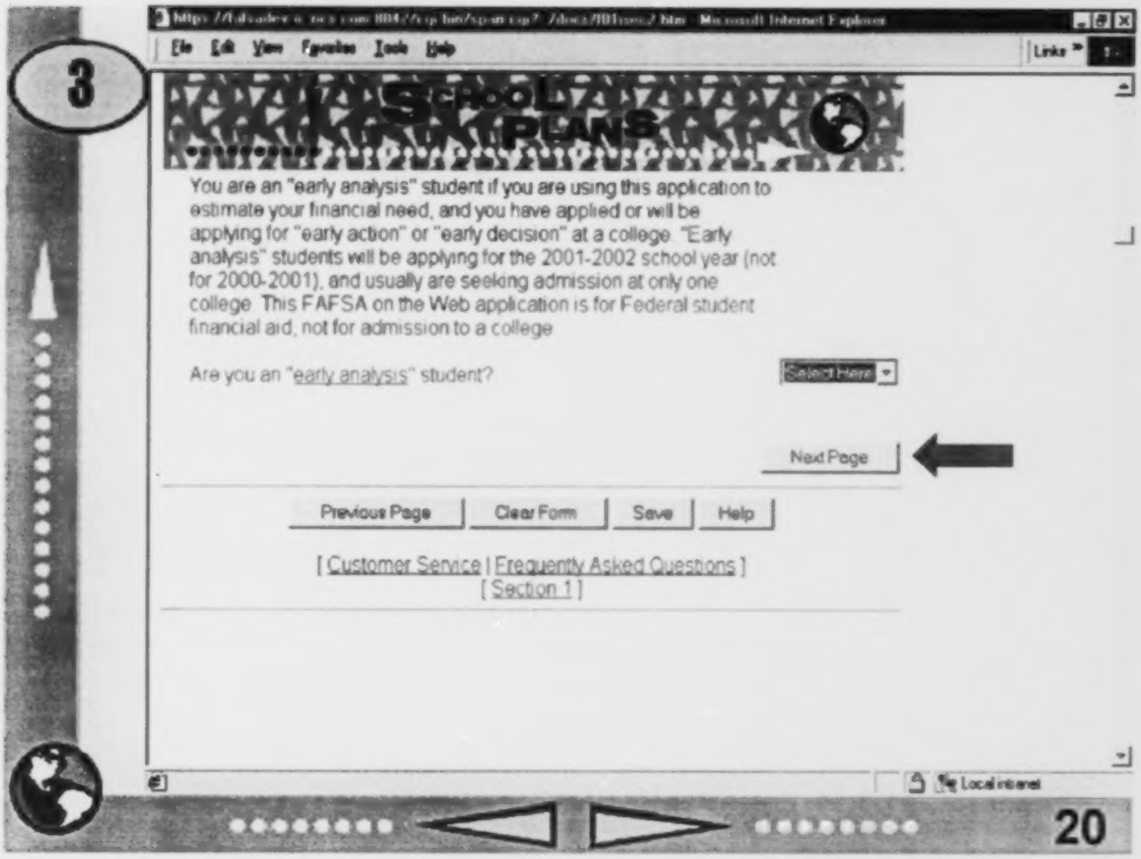
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You are an "early analysis" student if you are using this application to estimate your financial need, and you have applied or will be applying for "early action" or "early decision" at a college. "Early analysis" students will be applying for the 2001-2002 school year (not for 2000-2001), and usually are seeking admission at only one college. This FAFSA on the Web application is for Federal student financial aid, not for admission to a college.

Are you an "early analysis" student? Select Here

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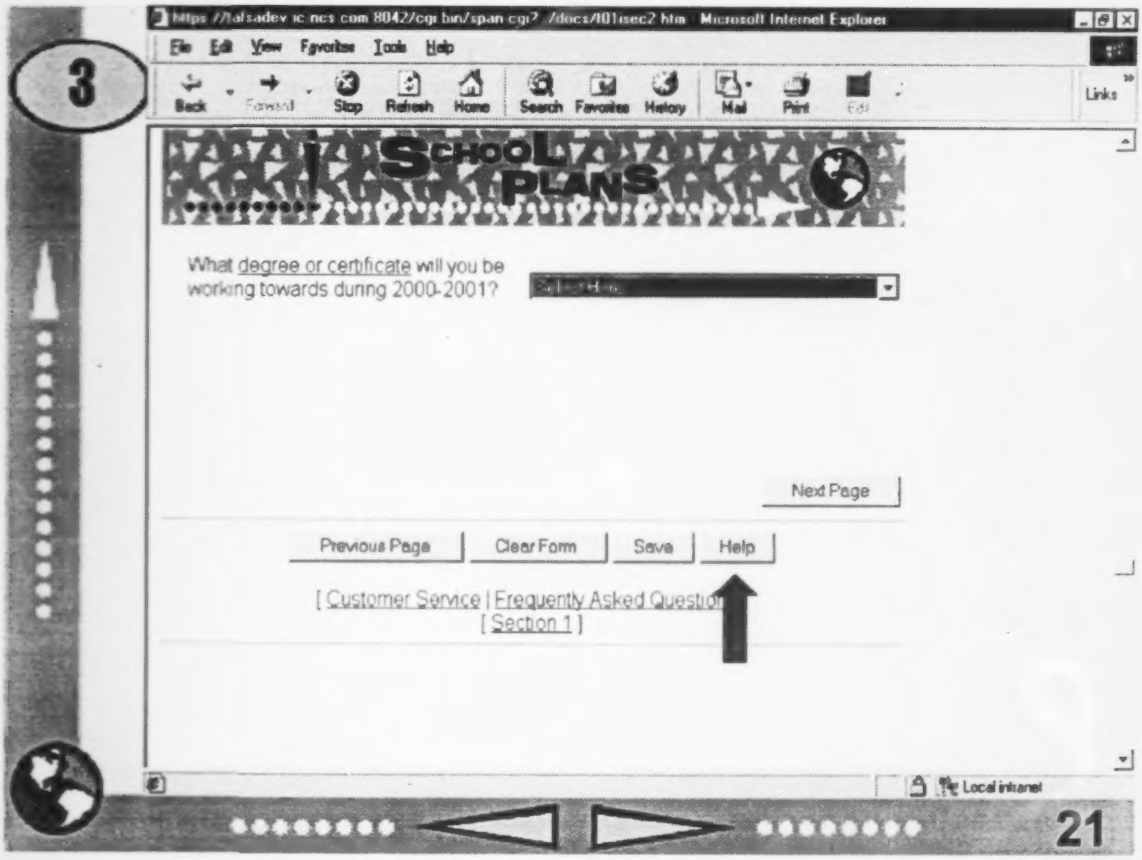
How to Find Help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What degree or certificate will you be working towards during 2000-2001?

Help is provided for each highlighted (blue text) topic. You can also search for help using the Table of Contents.

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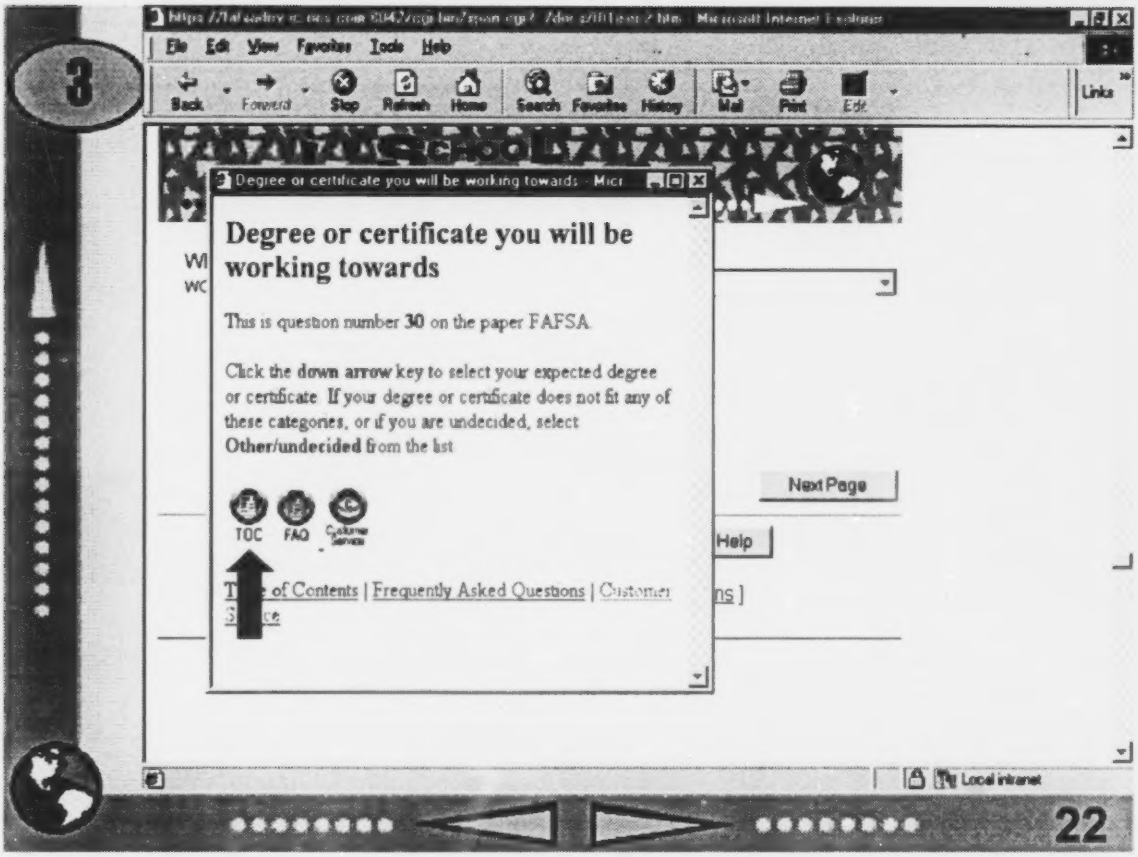
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Degree or certificate you will be working towards

This is question number **30** on the paper FAFSA.

Click the **down arrow** key to select your expected degree or certificate. If your degree or certificate does not fit any of these categories, or if you are undecided, select **Other/undecided** from the list.

Table of Contents | Frequently Asked Questions | Customer Service

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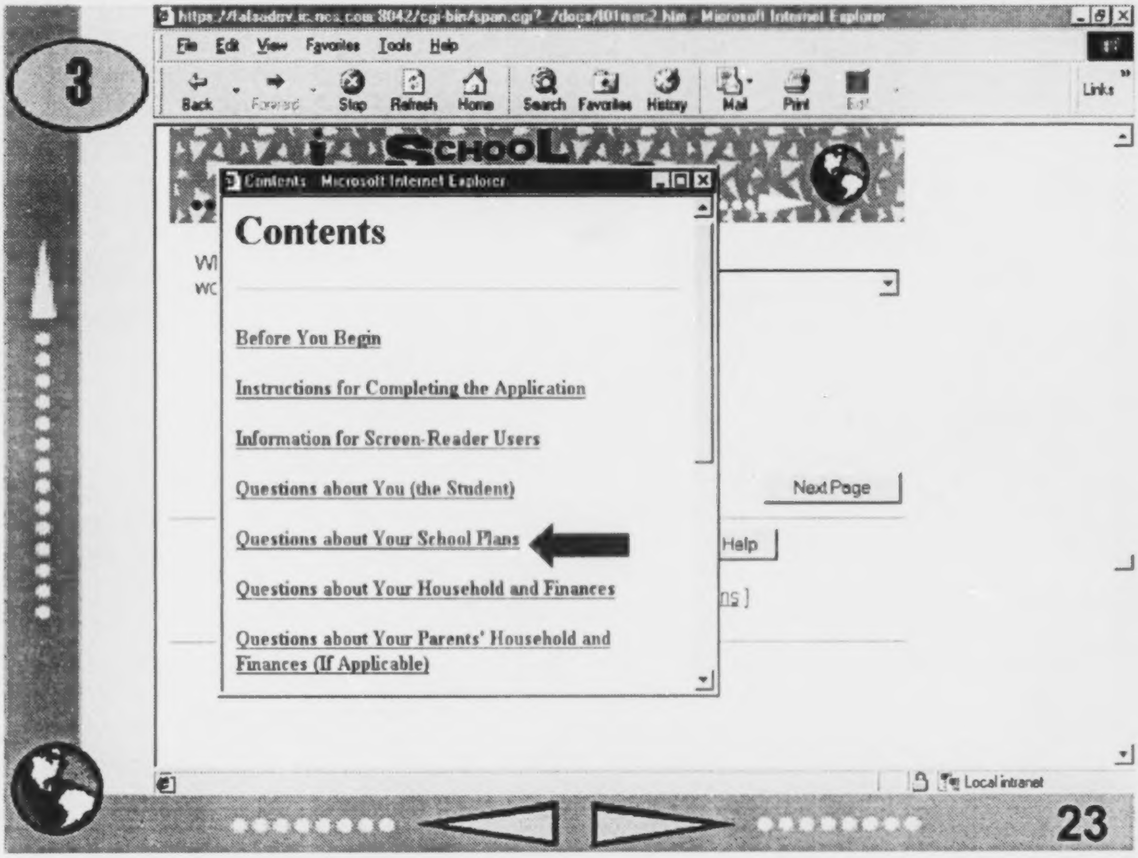
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- Instructions for Completing the Application
- Information for Screen-Reader Users
- Questions about You (the Student)
- Questions about Your School Plans
- Questions about Your Household and Finances
- Questions about Your Parents' Household and Finances (If Applicable)

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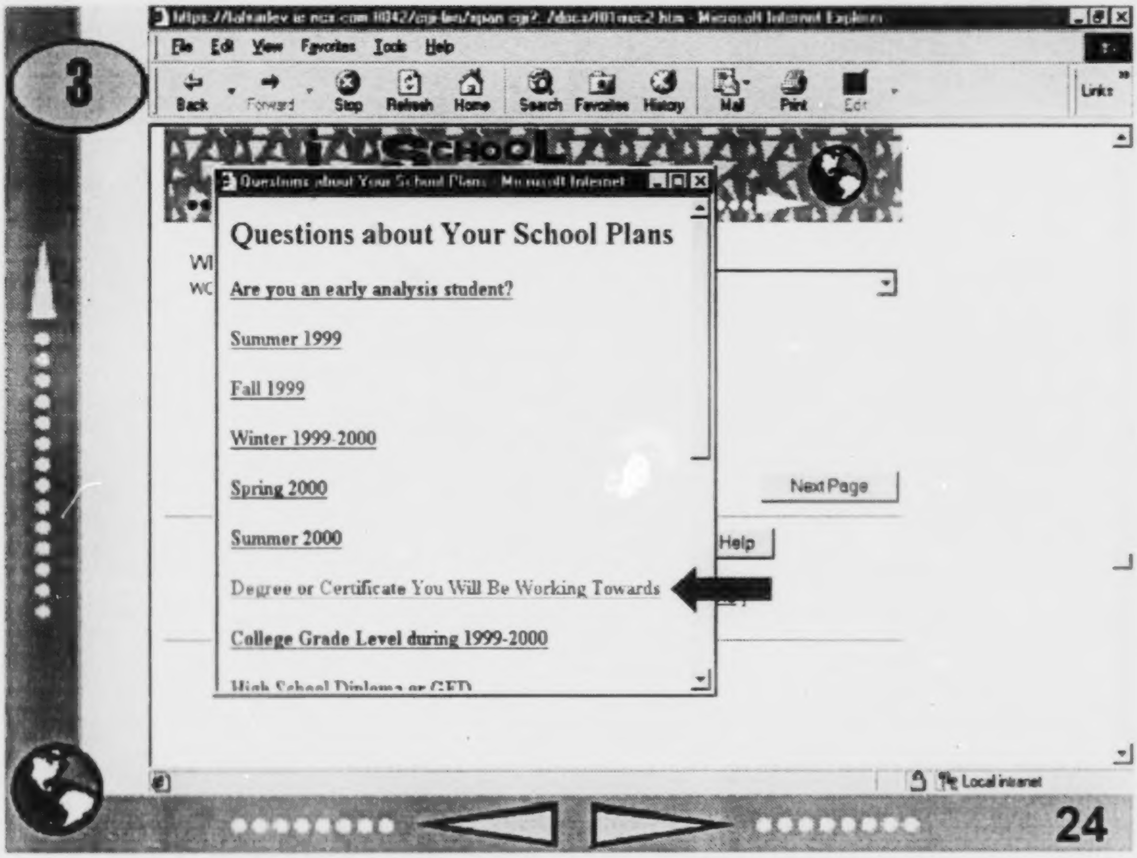
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Questions about Your School Plans

Are you an early analysis student?

Summer 1999

Fall 1999

Winter 1999-2000

Spring 2000

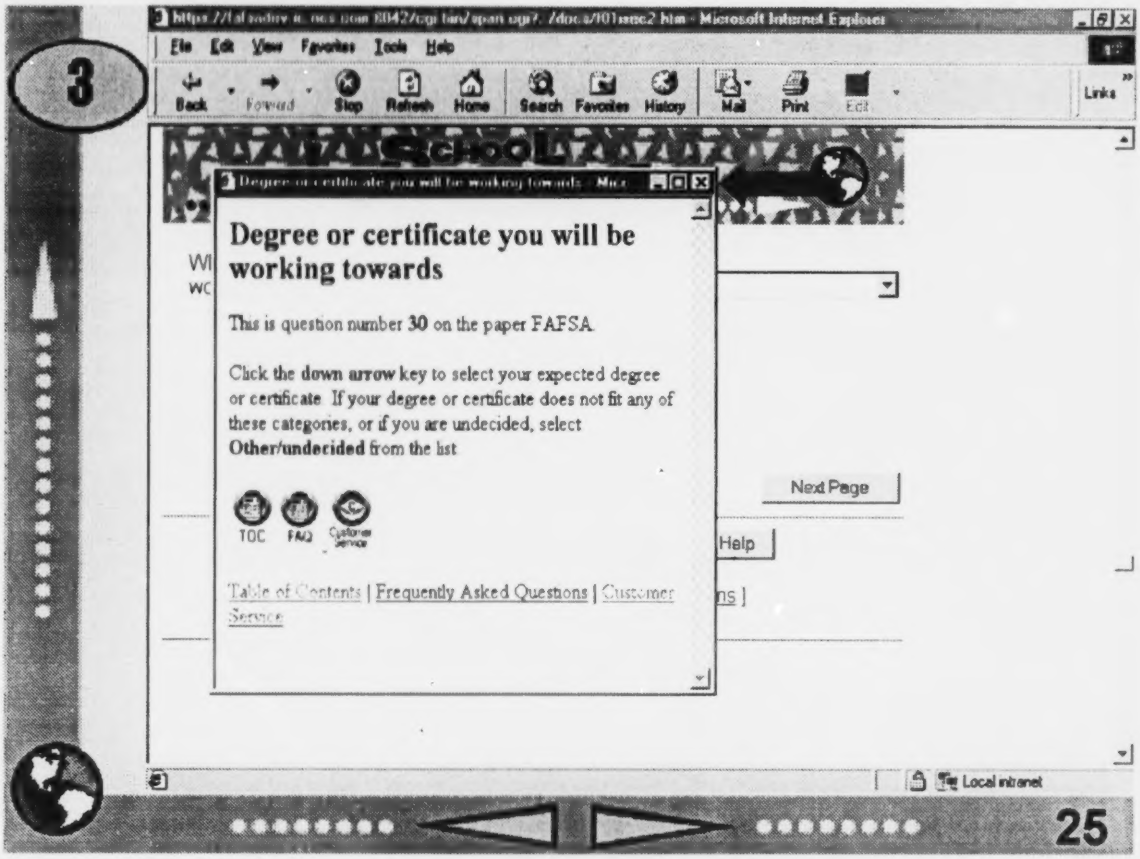
Summer 2000

Degree or Certificate You Will Be Working Towards

College Grade Level during 1999-2000

High School Diploma or GED

Notes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Degree or certificate you will be working towards

This is question number **30** on the paper FAFSA.

Click the **down arrow** key to select your expected degree or certificate. If your degree or certificate does not fit any of these categories, or if you are undecided, select **Other/undecided** from the list.

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Section 3: Finances

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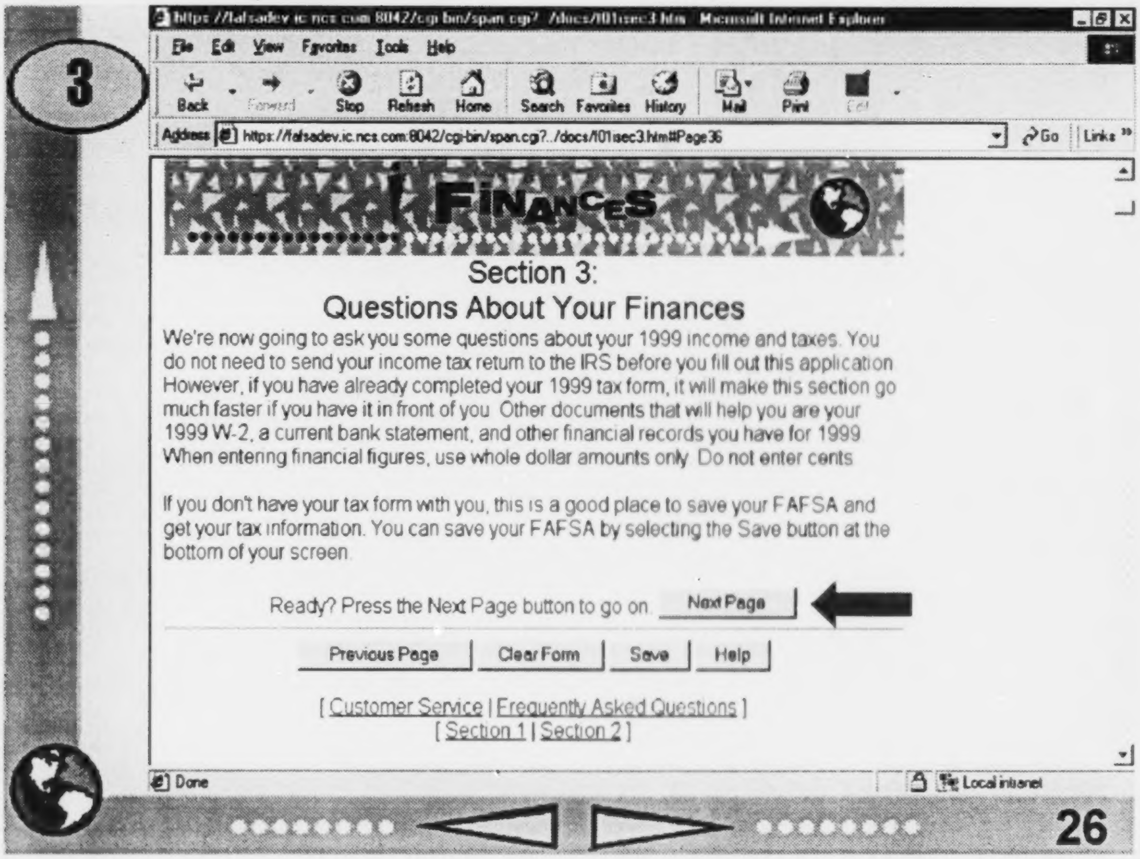
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Section 3:
Questions About Your Finances

We're now going to ask you some questions about your 1999 income and taxes. You do not need to send your income tax return to the IRS before you fill out this application. However, if you have already completed your 1999 tax form, it will make this section go much faster if you have it in front of you. Other documents that will help you are your 1999 W-2, a current bank statement, and other financial records you have for 1999. When entering financial figures, use whole dollar amounts only. Do not enter cents.

If you don't have your tax form with you, this is a good place to save your FAFSA and get your tax information. You can save your FAFSA by selecting the Save button at the bottom of your screen.

Ready? Press the Next Page button to go on. Next Page

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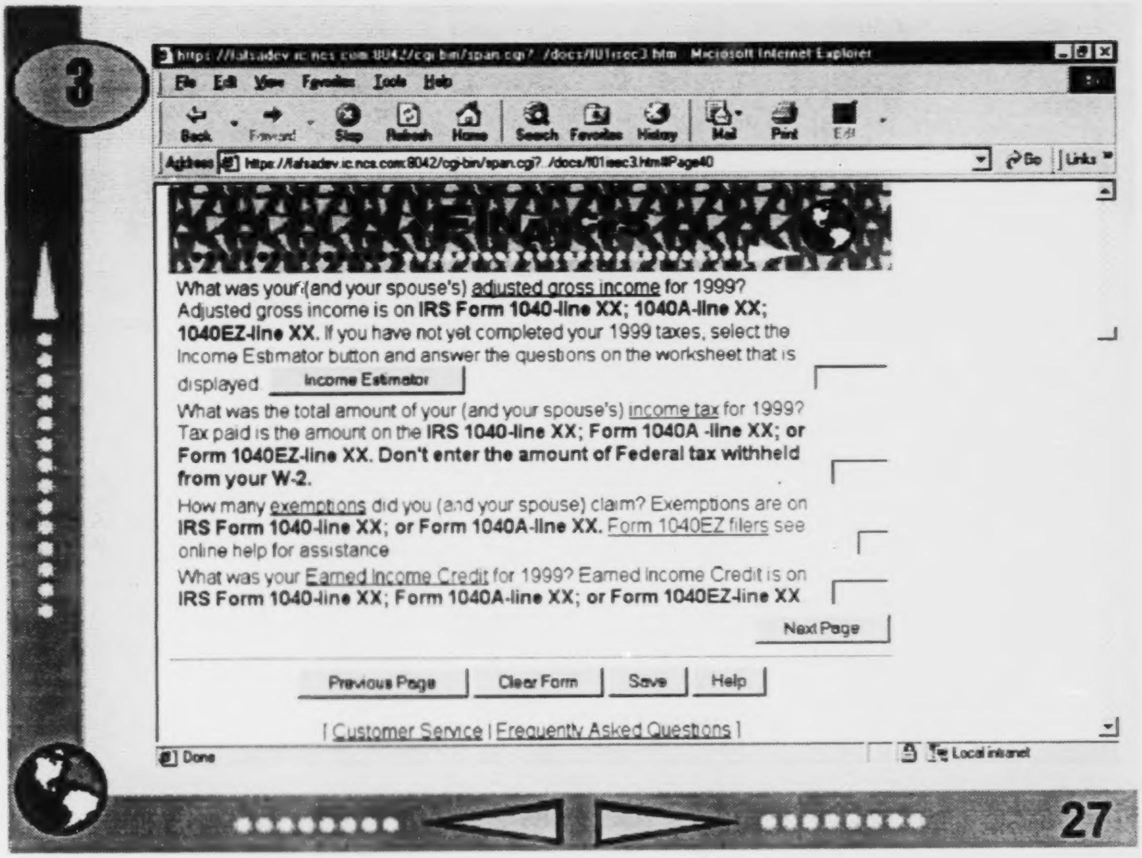
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What was your (and your spouse's) adjusted gross income for 1999? Adjusted gross income is on **IRS Form 1040-line XX; 1040A-line XX; 1040EZ-line XX.** If you have not yet completed your 1999 taxes, select the Income Estimator button and answer the questions on the worksheet that is displayed.

What was the total amount of your (and your spouse's) income tax for 1999? Tax paid is the amount on the **IRS 1040-line XX; Form 1040A -line XX; or Form 1040EZ-line XX. Don't enter the amount of Federal tax withheld from your W-2.**

How many exemptions did you (and your spouse) claim? Exemptions are on **IRS Form 1040-line XX; or Form 1040A-line XX.** Form 1040EZ filers see online help for assistance

What was your Earned Income Credit for 1999? Earned Income Credit is on **IRS Form 1040-line XX; Form 1040A-line XX; or Form 1040EZ-line XX**

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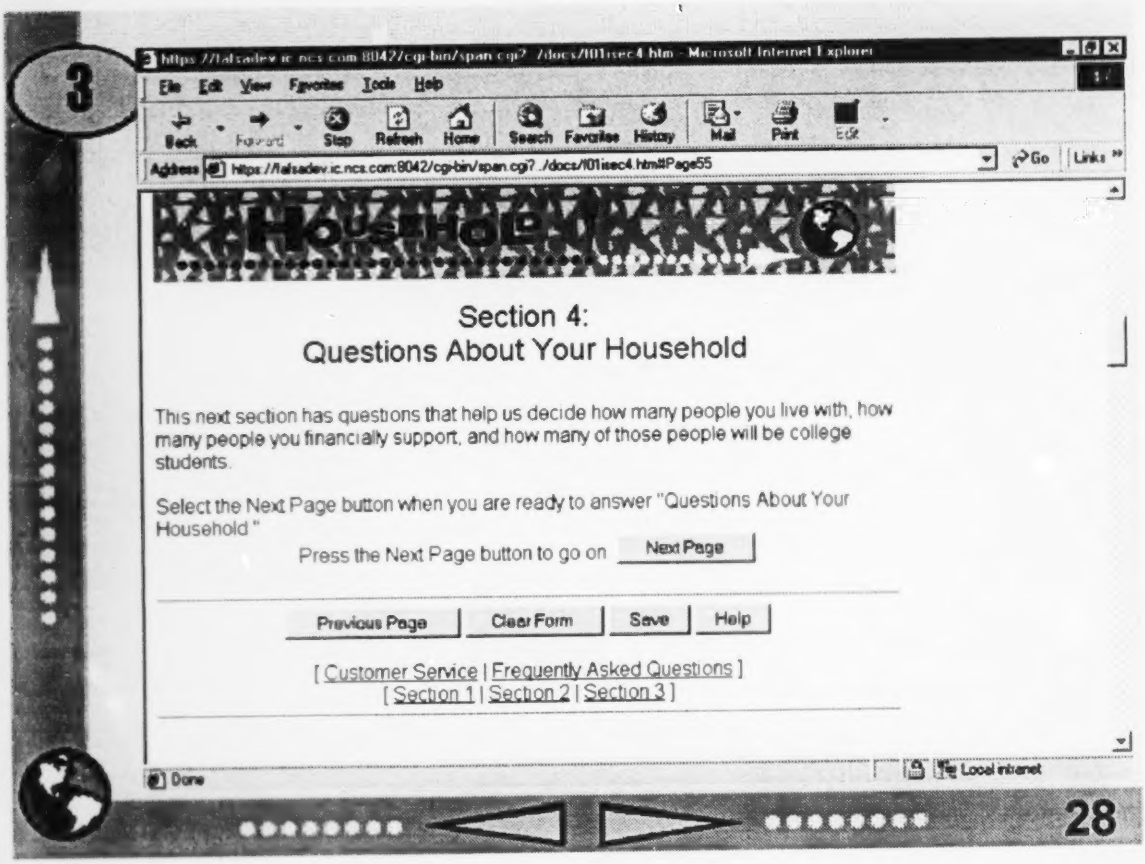
Section 4: Household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Section 4:
Questions About Your Household

This next section has questions that help us decide how many people you live with, how many people you financially support, and how many of those people will be college students.

Select the Next Page button when you are ready to answer "Questions About Your Household."

Press the Next Page button to go on [Next Page]

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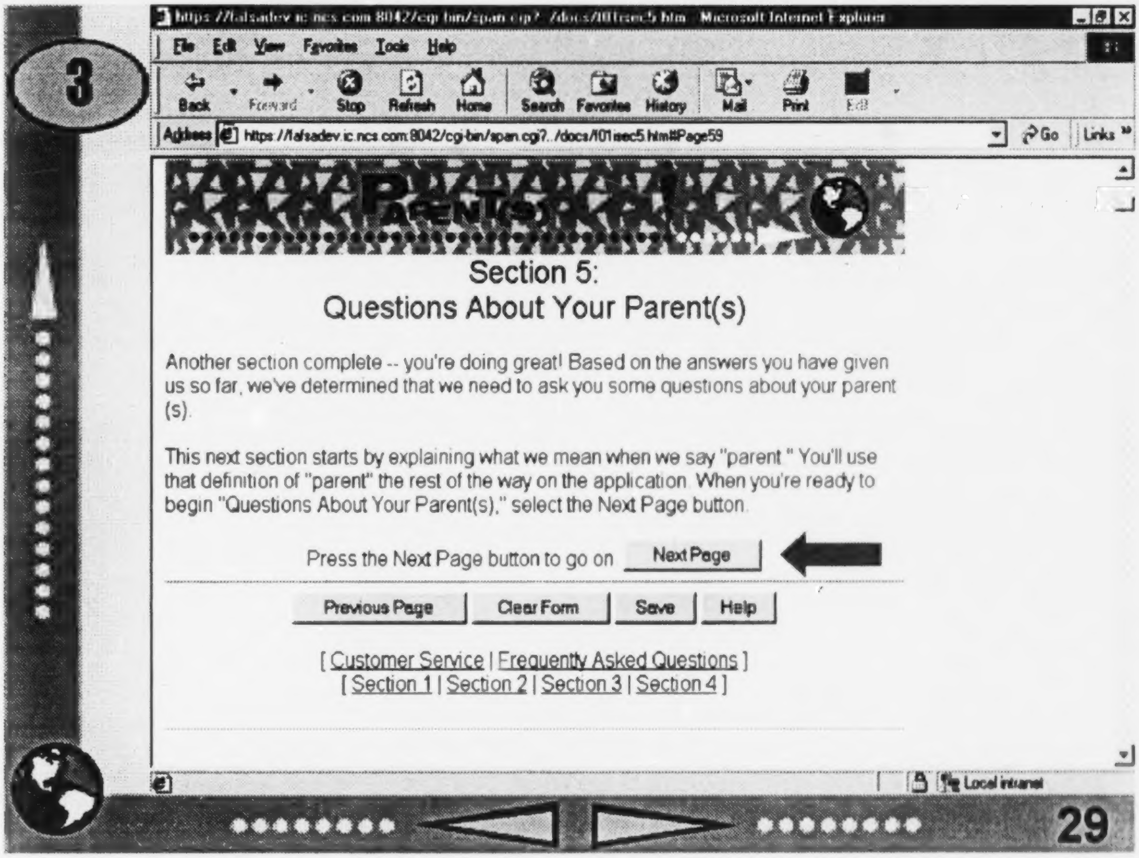
Section 5: Parents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Section 5:
Questions About Your Parent(s)

Another section complete -- you're doing great! Based on the answers you have given us so far, we've determined that we need to ask you some questions about your parent(s).

This next section starts by explaining what we mean when we say "parent." You'll use that definition of "parent" the rest of the way on the application. When you're ready to begin "Questions About Your Parent(s)," select the Next Page button.

Press the Next Page button to go on

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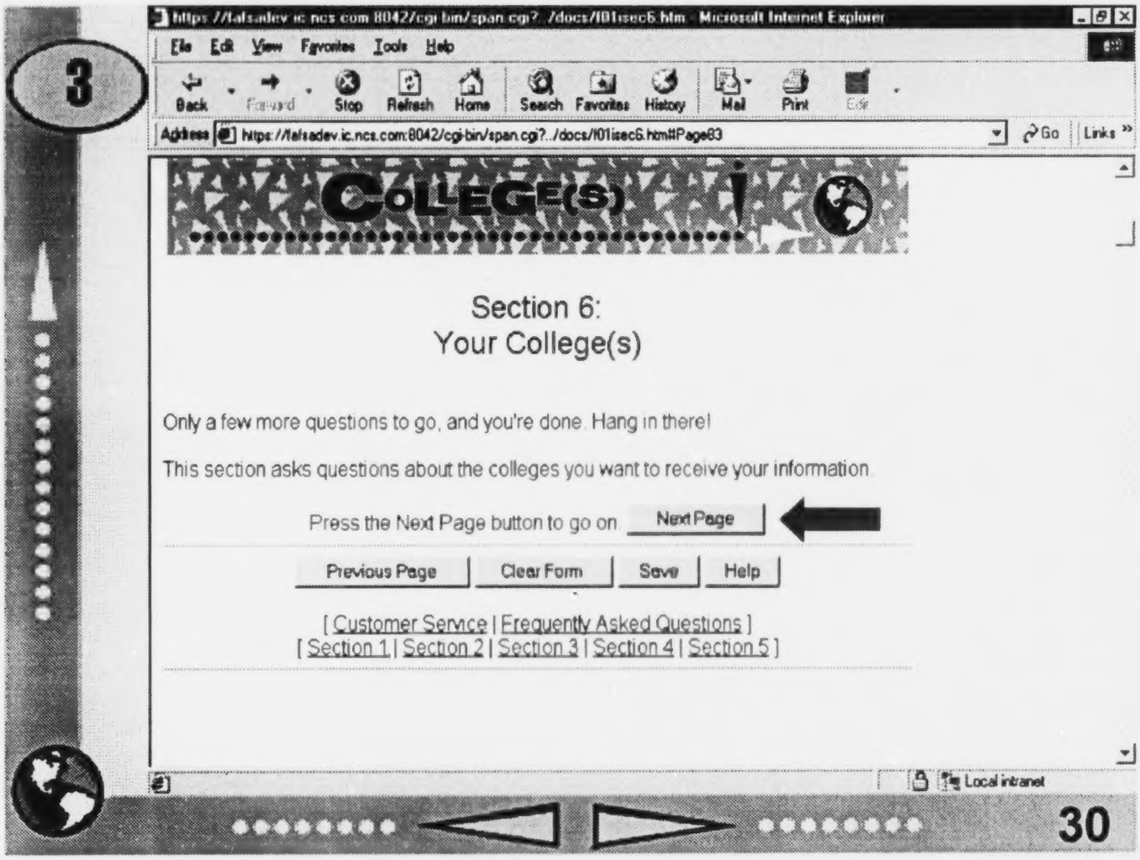
Section 6: Colleges

Notes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Section 6:
Your College(s)

Only a few more questions to go, and you're done. Hang in there!

This section asks questions about the colleges you want to receive your information.

Press the Next Page button to go on. Next Page

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You can locate the college code of your choice through an online search with only the name and state of the college you are seeking.

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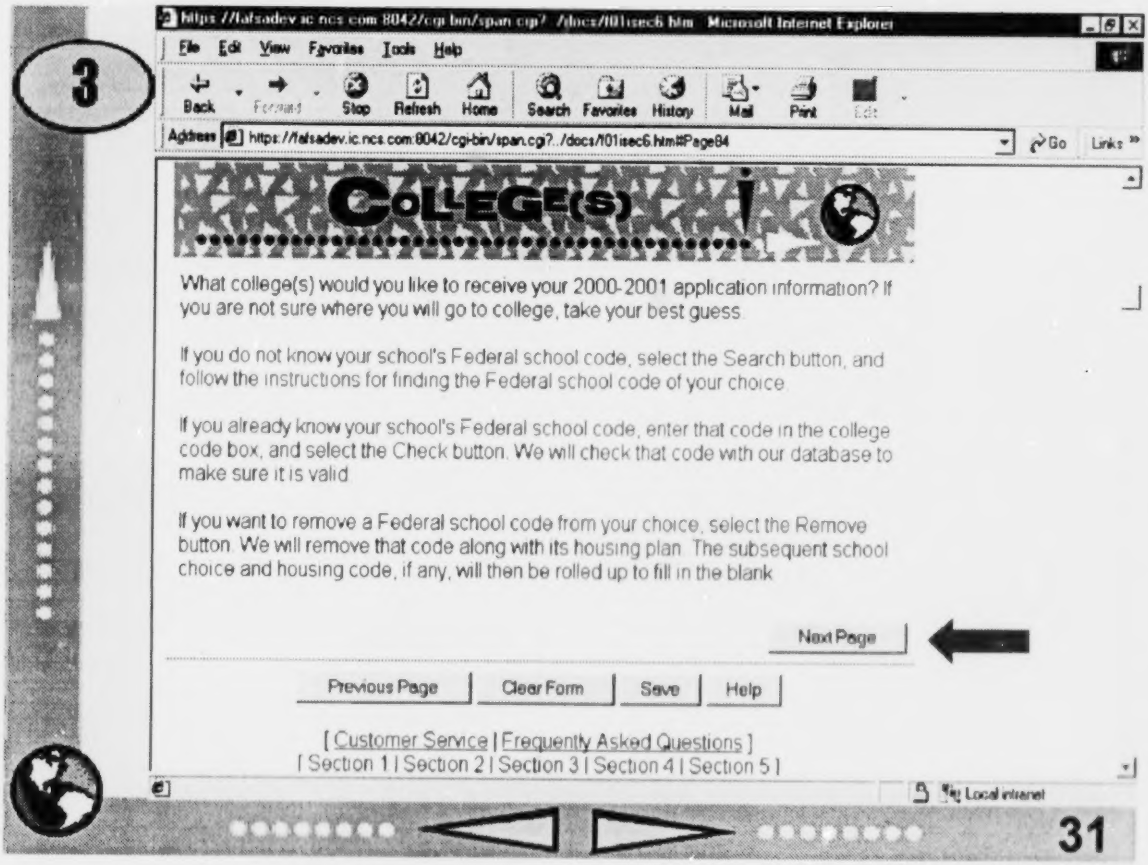
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What college(s) would you like to receive your 2000-2001 application information? If you are not sure where you will go to college, take your best guess.

If you do not know your school's Federal school code, select the Search button, and follow the instructions for finding the Federal school code of your choice.

If you already know your school's Federal school code, enter that code in the college code box, and select the Check button. We will check that code with our database to make sure it is valid.

If you want to remove a Federal school code from your choice, select the Remove button. We will remove that code along with its housing plan. The subsequent school choice and housing code, if any, will then be rolled up to fill in the blank.

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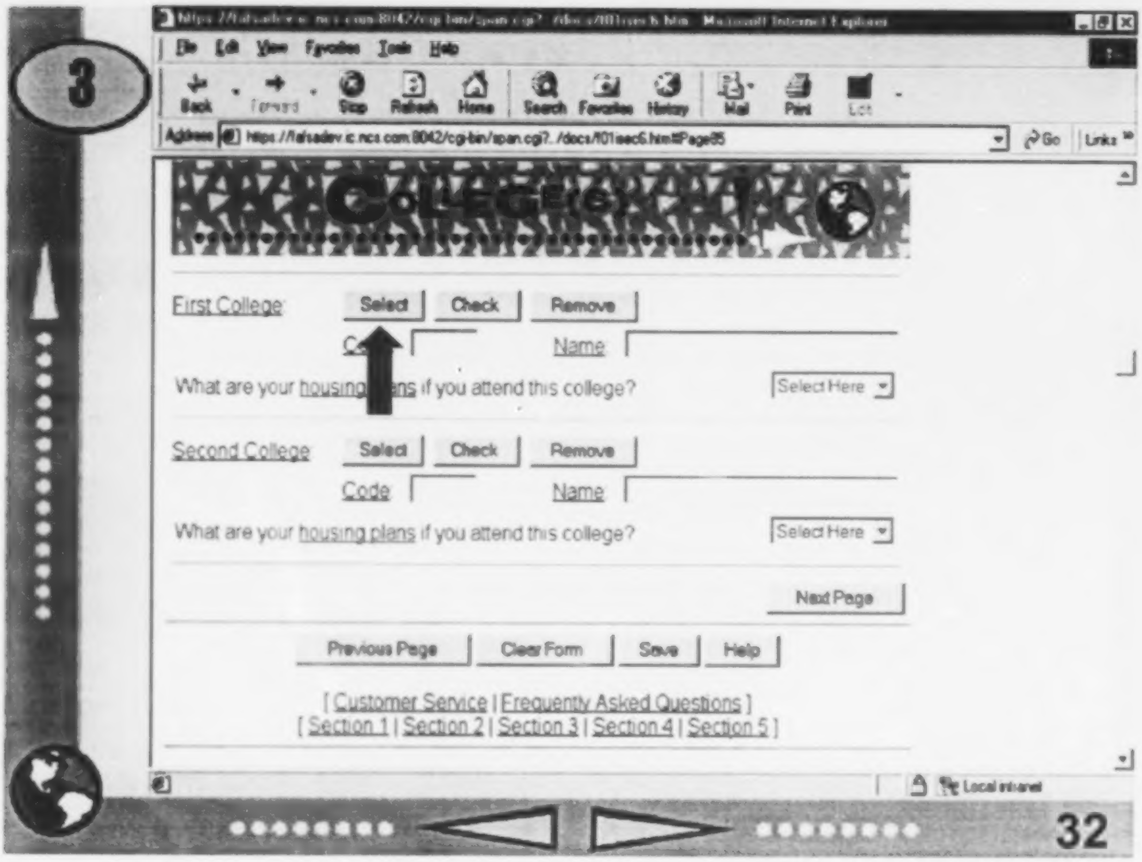

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First College:
Code Name
What are your housing plans if you attend this college?

Second College:
Code Name
What are your housing plans if you attend this college?

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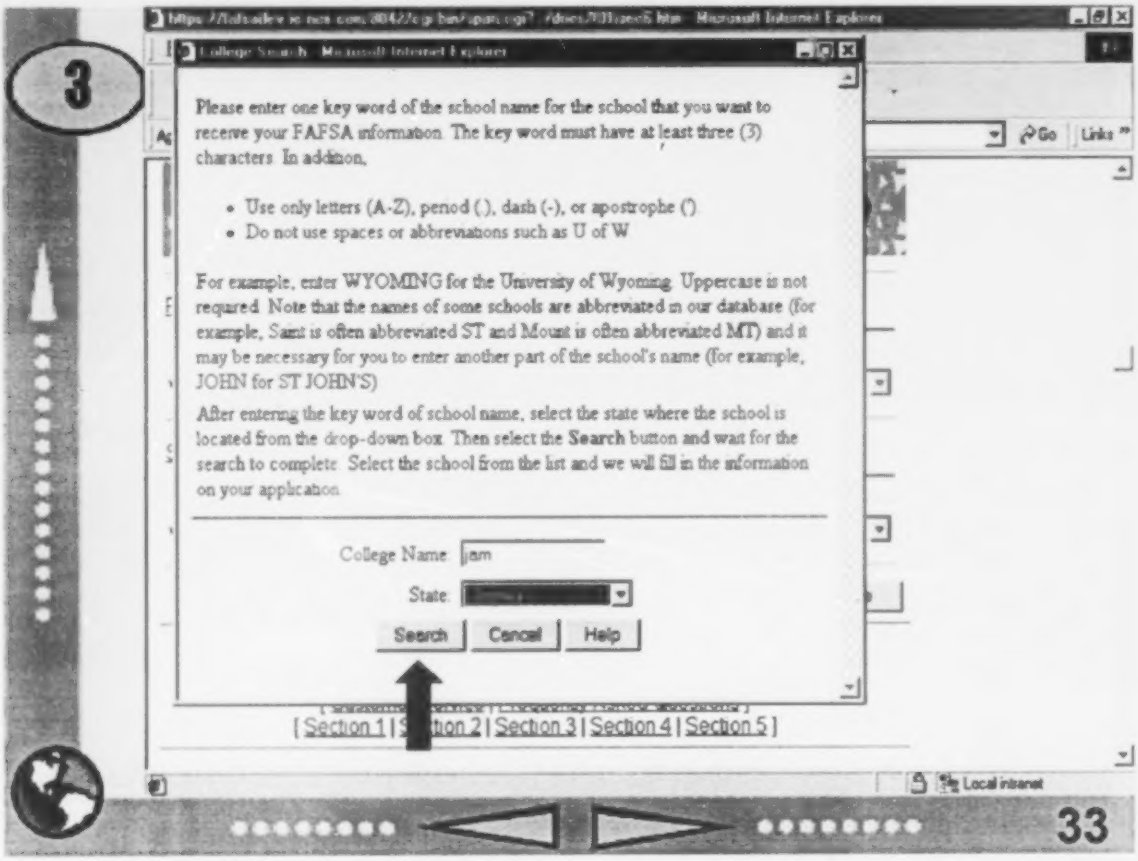

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Please enter one key word of the school name for the school that you want to receive your FAFSA information. The key word must have at least three (3) characters. In addition,

- Use only letters (A-Z), period (.), dash (-), or apostrophe (')
- Do not use spaces or abbreviations such as U of W

For example, enter WYOMING for the University of Wyoming. Uppercase is not required. Note that the names of some schools are abbreviated in our database (for example, Saint is often abbreviated ST and Mount is often abbreviated MT) and it may be necessary for you to enter another part of the school's name (for example, JOHN for ST JOHN'S)

After entering the key word of school name, select the state where the school is located from the drop-down box. Then select the **Search** button and wait for the search to complete. Select the school from the list and we will fill in the information on your application.

College Name: jam

State:

Search | Cancel | Help

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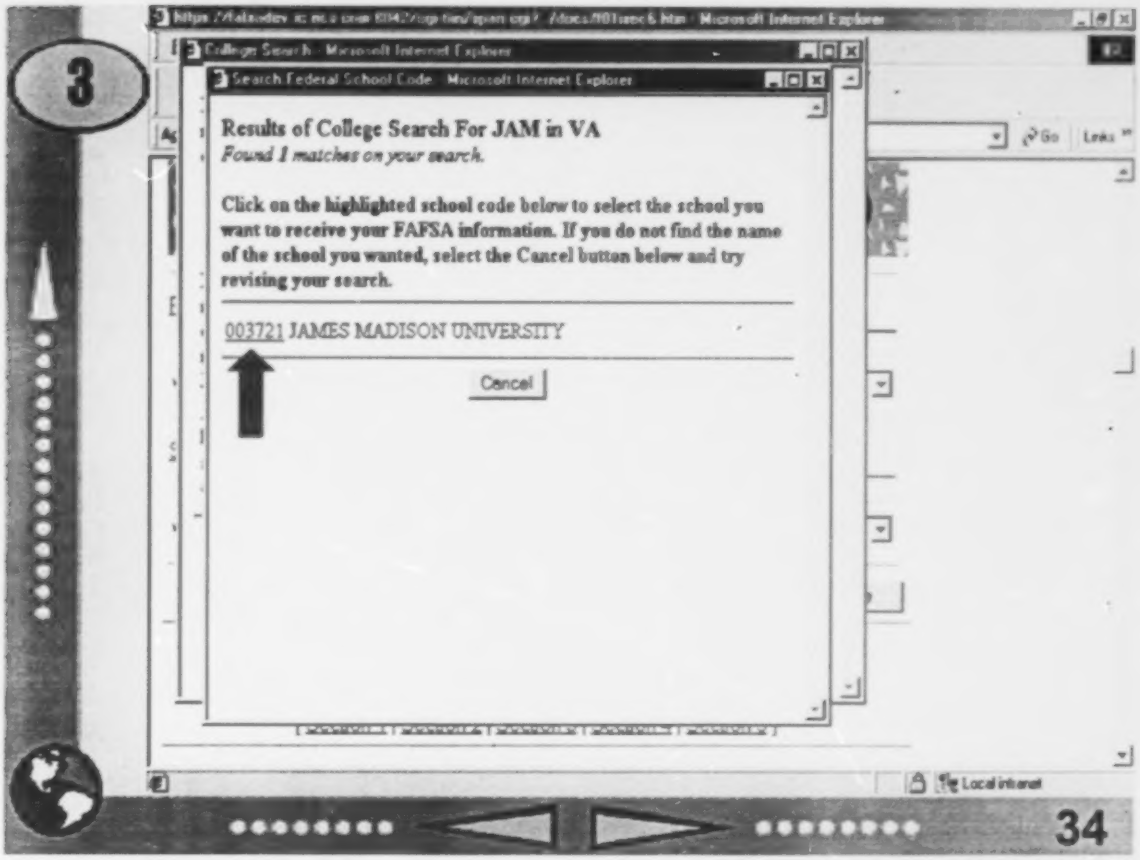
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Results of College Search For JAM in VA

Found 1 matches on your search.

Click on the highlighted school code below to select the school you want to receive your FAFSA information. If you do not find the name of the school you wanted, select the Cancel button below and try revising your search.

003721 JAMES MADISON UNIVERSITY

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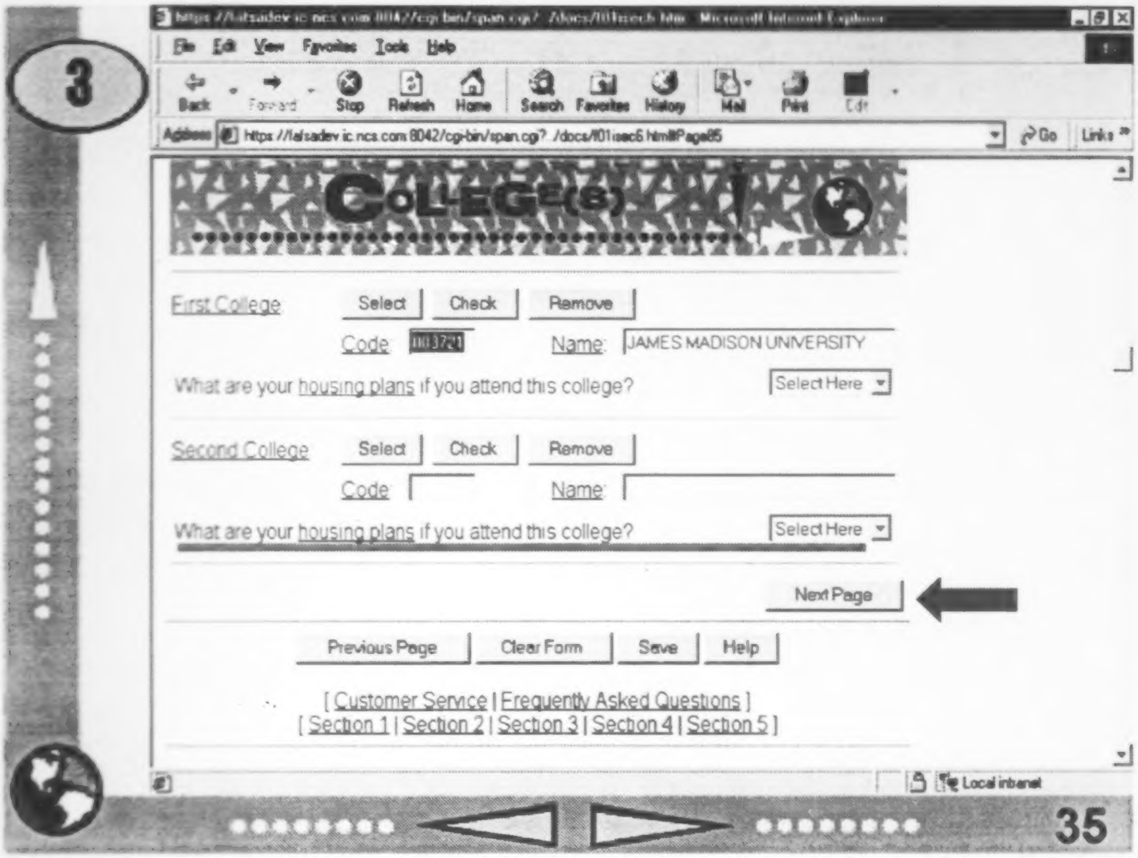

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First College

Code: 003721 Name: JAMES MADISON UNIVERSITY

What are your housing plans if you attend this college? Select Here

Second College

Code: Name:

What are your housing plans if you attend this college? Select Here

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Final Check

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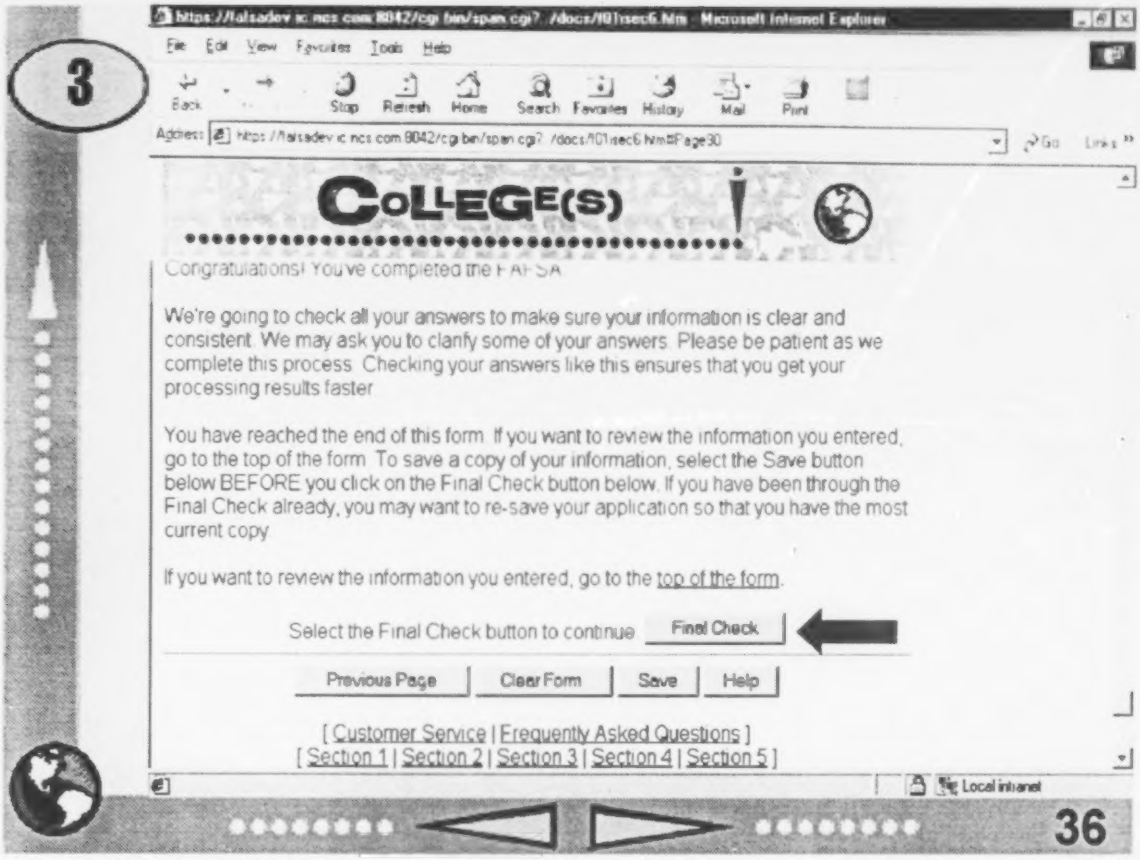
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Congratulations! You've completed the FAFSA.

We're going to check all your answers to make sure your information is clear and consistent. We may ask you to clarify some of your answers. Please be patient as we complete this process. Checking your answers like this ensures that you get your processing results faster.

You have reached the end of this form. If you want to review the information you entered, go to the top of the form. To save a copy of your information, select the Save button below BEFORE you click on the Final Check button below. If you have been through the Final Check already, you may want to re-save your application so that you have the most current copy.

If you want to review the information you entered, go to the top of the form.

Select the Final Check button to continue **Final Check**

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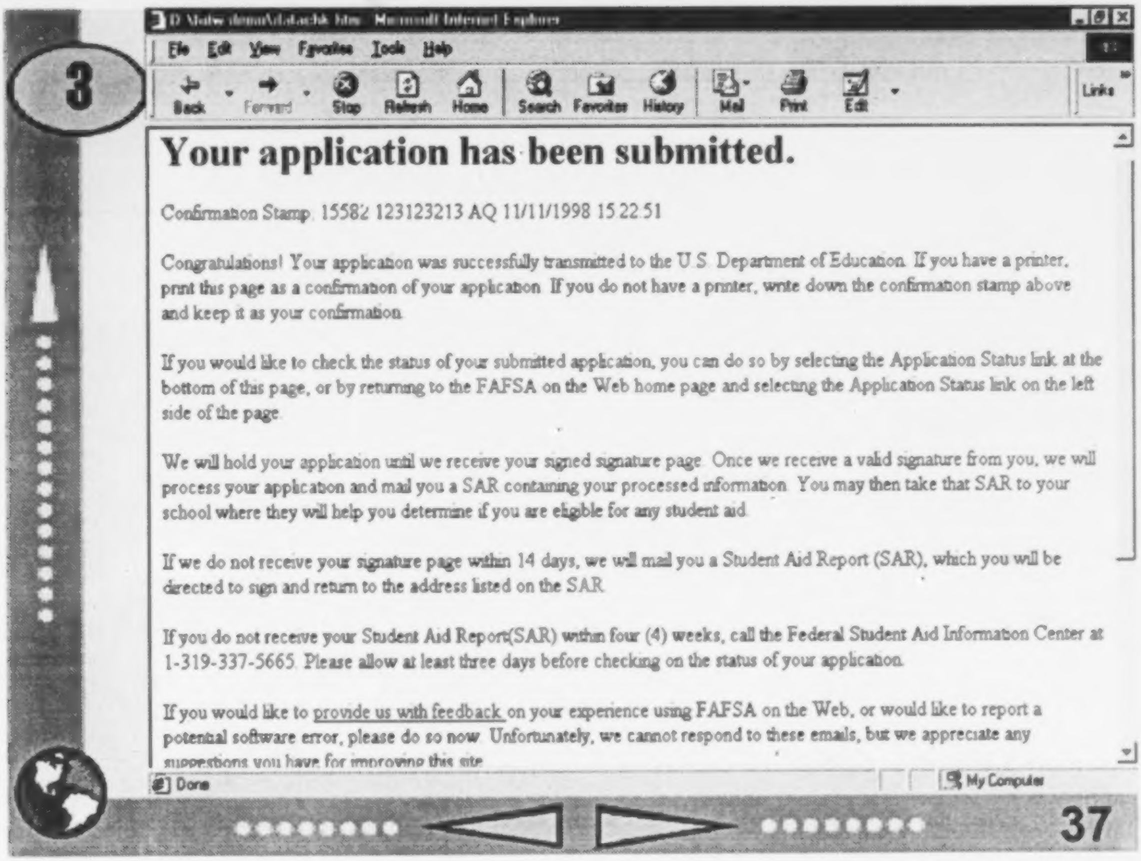


Your application has been submitted.

Confirmation Stamp: 15582 123123213 AQ 11/11/1998 15:22:51

Congratulations! Your application was successfully transmitted to the U.S. Department of Education. If you have a printer, print this page as a confirmation of your application. If you do not have a printer, write down the confirmation stamp above and keep it as your confirmation.

If you would like to check the status of your submitted application, you can do so by selecting the Application Status link at the bottom of this page, or by returning to the FAFSA on the Web home page and selecting the Application Status link on the left side of the page.

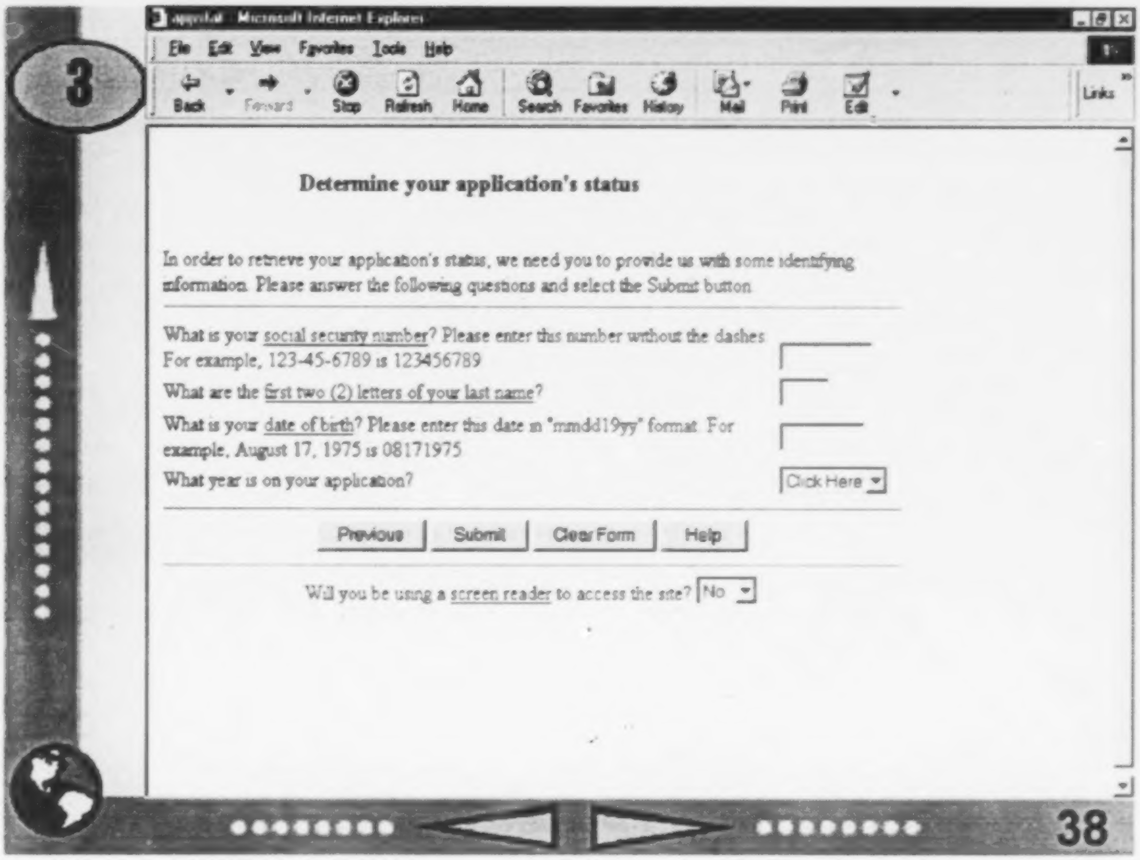
We will hold your application until we receive your signed signature page. Once we receive a valid signature from you, we will process your application and mail you a SAR containing your processed information. You may then take that SAR to your school where they will help you determine if you are eligible for any student aid.

If we do not receive your signature page within 14 days, we will mail you a Student Aid Report (SAR), which you will be directed to sign and return to the address listed on the SAR.

If you do not receive your Student Aid Report(SAR) within four (4) weeks, call the Federal Student Aid Information Center at 1-319-337-5665. Please allow at least three days before checking on the status of your application.

If you would like to provide us with feedback on your experience using FAFSA on the Web, or would like to report a potential software error, please do so now. Unfortunately, we cannot respond to these emails, but we appreciate any suggestions you have for improving this site

Notes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Determine your application's status

In order to retrieve your application's status, we need you to provide us with some identifying information. Please answer the following questions and select the Submit button.

What is your social security number? Please enter this number without the dashes. For example, 123-45-6789 is 123456789

What are the first two (2) letters of your last name?

What is your date of birth? Please enter this date in "mmdd19yy" format. For example, August 17, 1975 is 08171975

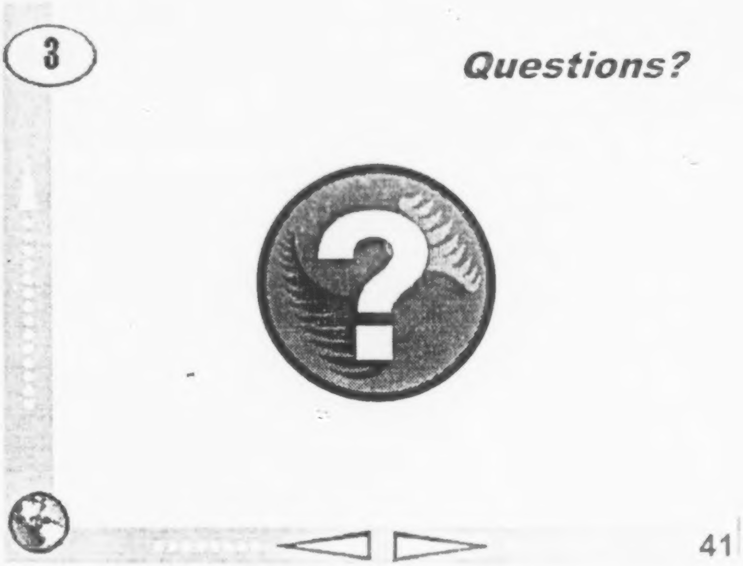
What year is on your application? Click Here

Will you be using a screen reader to access the site? No

Notes

Exercise

- Use case study
- Complete application using 1999-2000 prototype



Questions?

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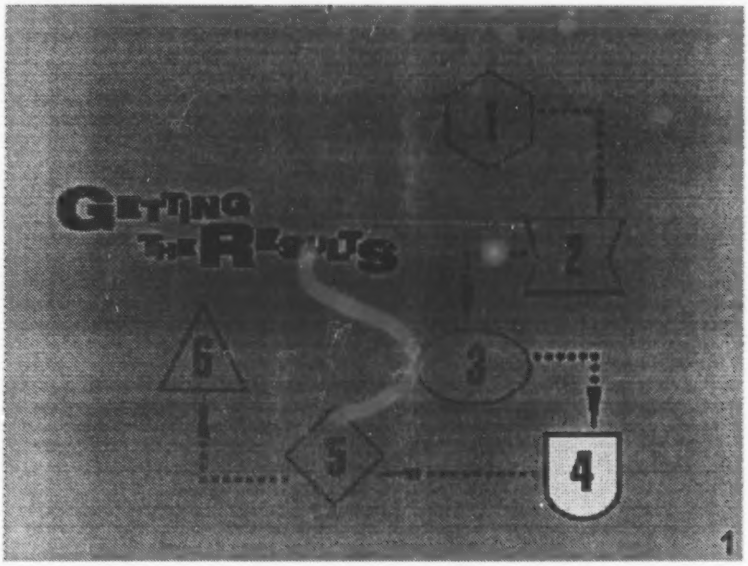
GETTING THE RESULTS

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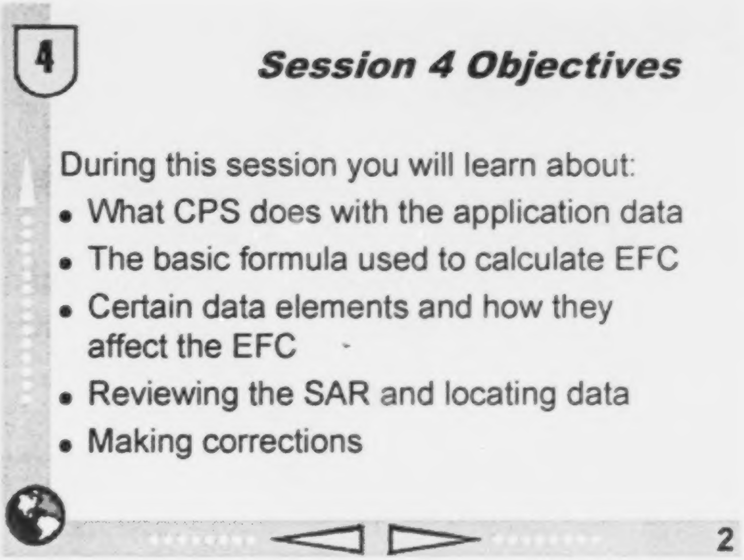
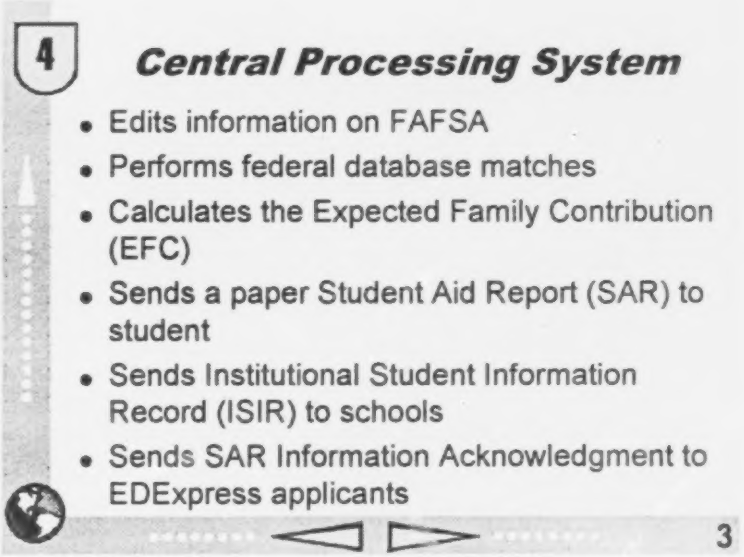


Session 4 Objectives

During this session you will learn about:
- What CPS does with the application data
- The basic formula used to calculate EFC
- Certain data elements and how they affect the EFC
- Reviewing the SAR and locating data
- Making corrections



Central Processing System

- Edits information on FAFSA
- Performs federal database matches
- Calculates the Expected Family Contribution (EFC)
- Sends a paper Student Aid Report (SAR) to student
- Sends Institutional Student Information Record (ISIR) to schools
- Sends SAR Information Acknowledgment to EDExpress applicants

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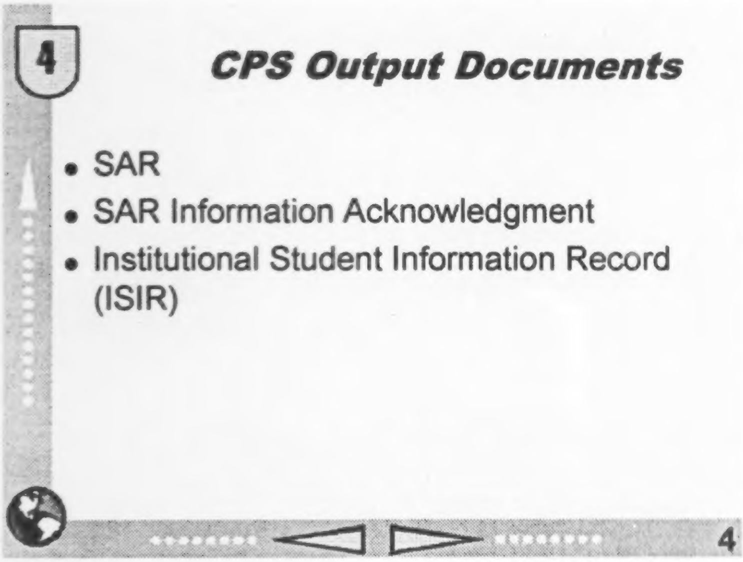
Match Agency	Reason for Match
Social Security Administration	**To ensure that the student has entered a valid Social Security Number, has provided the correct name and date of birth, and confirm the student's U.S. citizenship.**
Immigration and Naturalization Service	To check the immigration status of non citizen students and ensure they have provided valid registered alien information that will make them eligible to receive Title IV aid.
Selective Service	To ensure that all male aid applicants required to do so have registered with Selective Service.
Department of Education	To see if the student has any defaulted student loans which would make them ineligible for additional aid.
Department of Justice	To ensure that the student has not been involved in a legal matter which resulted in a sentence that would forbid them from receiving federal aid.
Veterans' Administration	To confirm the student's veteran status.

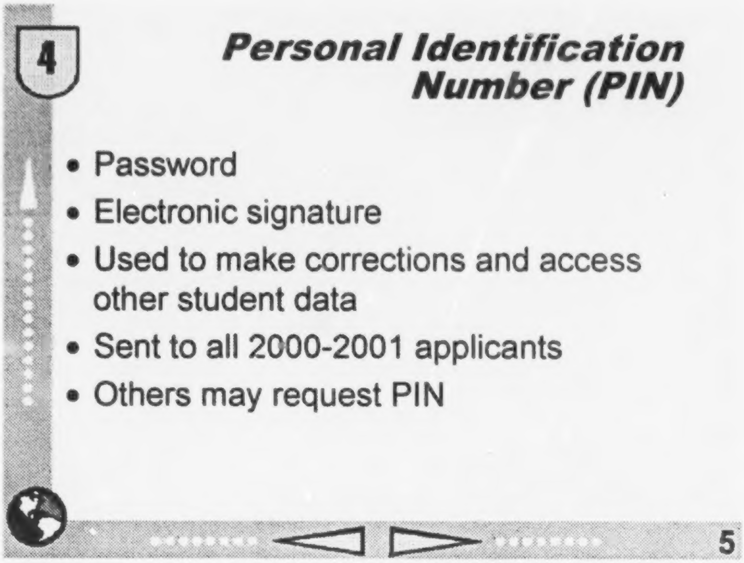


CPS Output Documents

- SAR
- SAR Information Acknowledgment
- Institutional Student Information Record (ISIR)

The CPS will send the same information to both the student and the schools that the student identified on the FAFSA. The student receives a Student Aid Report (SAR), while the school receives an electronic form of the SAR. This is called the Institutional Student Information Record (ISIR). Some schools use EDExpress to enter the FAFSA data electronically. If so, the school will receive the results in three days, and the student will receive a SAR Information Acknowledgement, rather than a SAR, in the mail. The student should be reminded that if the school has made changes to the acknowledgement form, the student should not make the same changes.

Notes



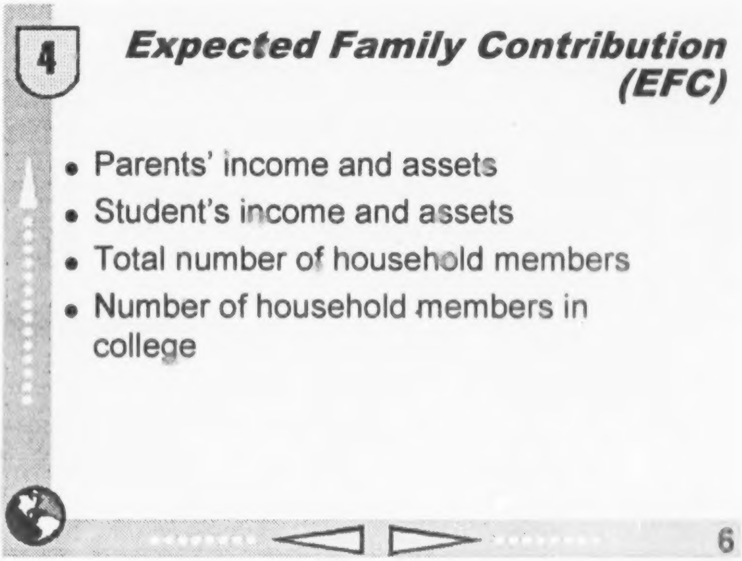
4

Personal Identification Number (PIN)

- Password
- Electronic signature
- Used to make corrections and access other student data
- Sent to all 2000-2001 applicants
- Others may request PIN

5

All applicants who file a 2000-2001 FAFSA and successfully match with the Social Security Administration will be mailed PINs. In addition, anyone (including parents and high school students) can request PINs using the PIN Enrollment Web Site, starting in the Spring of 2000. The address for the site will be http://www.pin.ed.gov. Requesters must provide their full name, Social Security number, date of birth, and full address. (This information will be verified with the Social Security Administration as part of the SSA match.) They then must print out, sign and submit a signature page. If a match with SSA is successfully completed and a signature page is received within 30 days of the request, the user is sent a PIN.



4

Expected Family Contribution (EFC)

- Parents' income and assets
- Student's income and assets
- Total number of household members
- Number of household members in college

6

Each piece of information students and their parents report on the FAFSA has a very specific place in the Expected Family Contribution (EFC) calculation. The parents' income and assets, the student's income and assets, the number of people in the household, the number of household members attending college and other values are used to determine each student's EFC.

Notes

EFC Formula Types

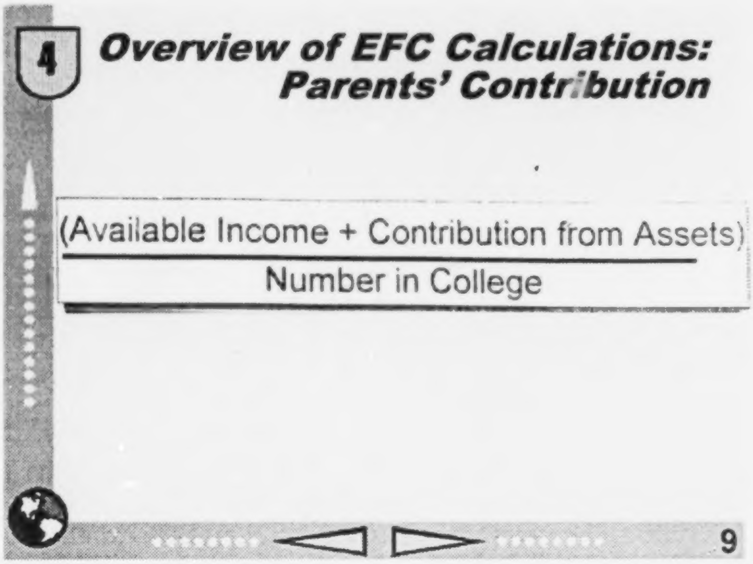
- Regular
- Simplified Needs Test
- Automatic Zero

Overview of EFC Calculations: Parents' Contribution

Total Income
– Allowances
= Available Income

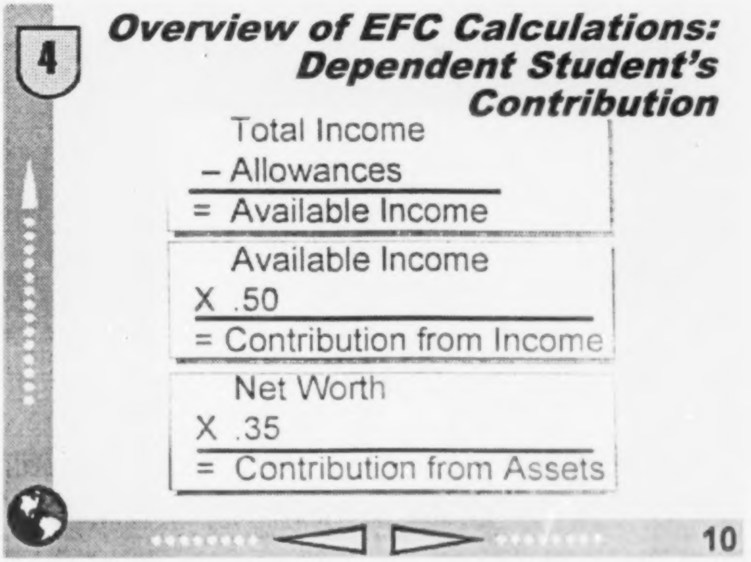
Net Worth
– Allowances
= Contribution from Assets

Notes



Overview of EFC Calculations: Parents' Contribution

$$\frac{\text{(Available Income + Contribution from Assets)}}{\text{Number in College}}$$



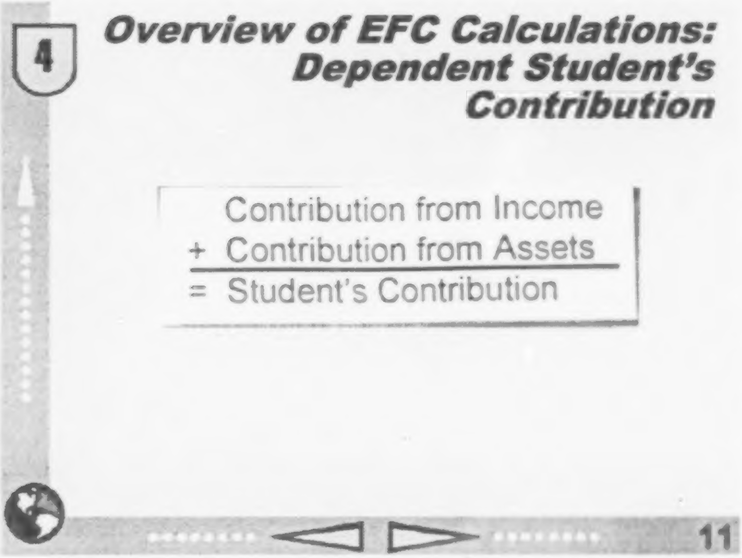
Overview of EFC Calculations: Dependent Student's Contribution

Total Income
– Allowances
= Available Income

Available Income
X .50
= Contribution from Income

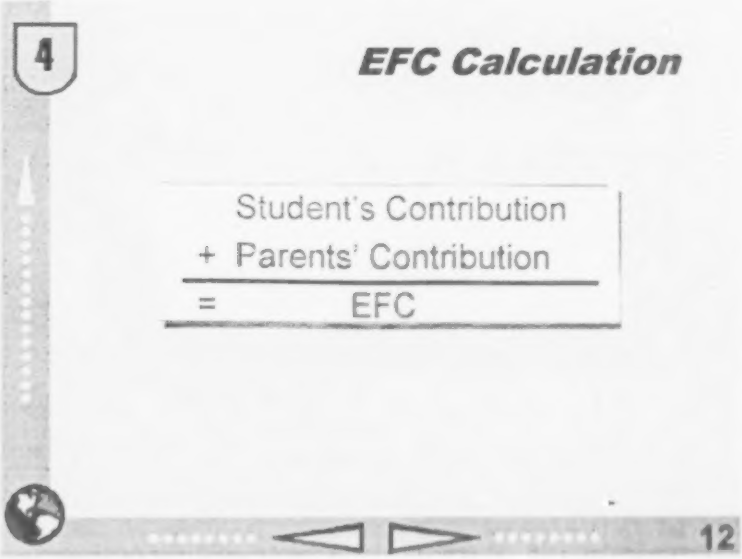
Net Worth
X .35
= Contribution from Assets

Notes



Overview of EFC Calculations: Dependent Student's Contribution

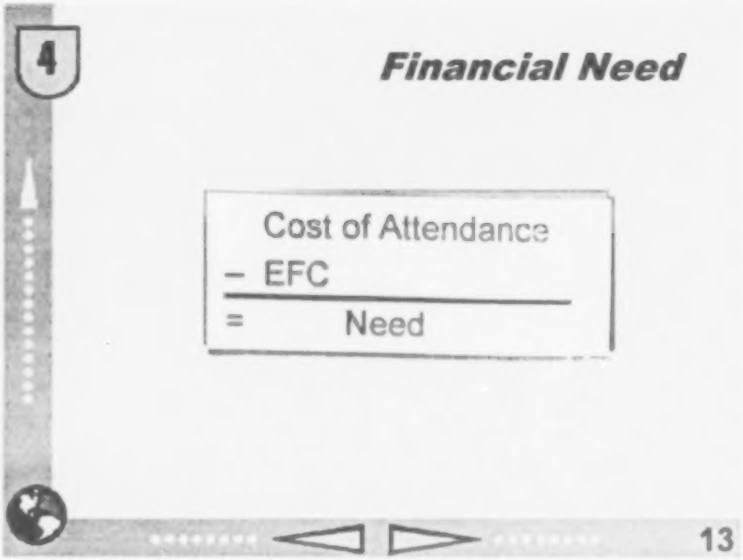
Contribution from Income
+ Contribution from Assets
= Student's Contribution



EFC Calculation

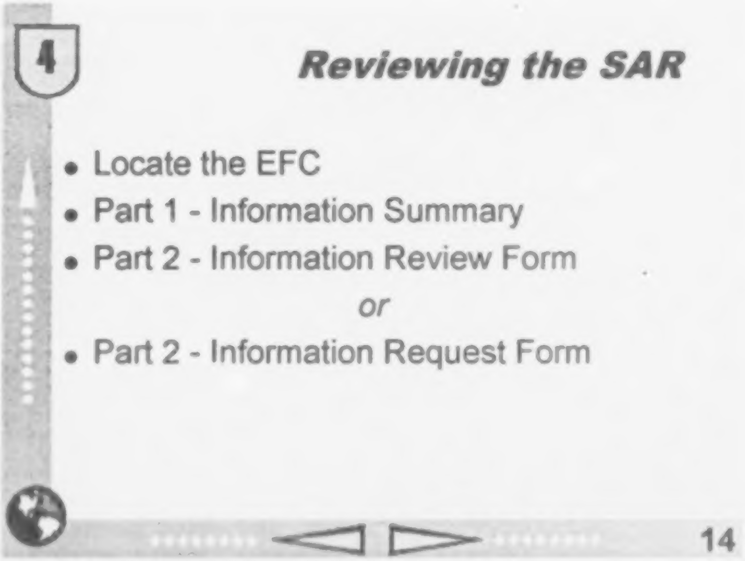
Student's Contribution
+ Parents' Contribution
= EFC

Notes



Financial Need

Cost of Attendance
– EFC
= Need



Reviewing the SAR

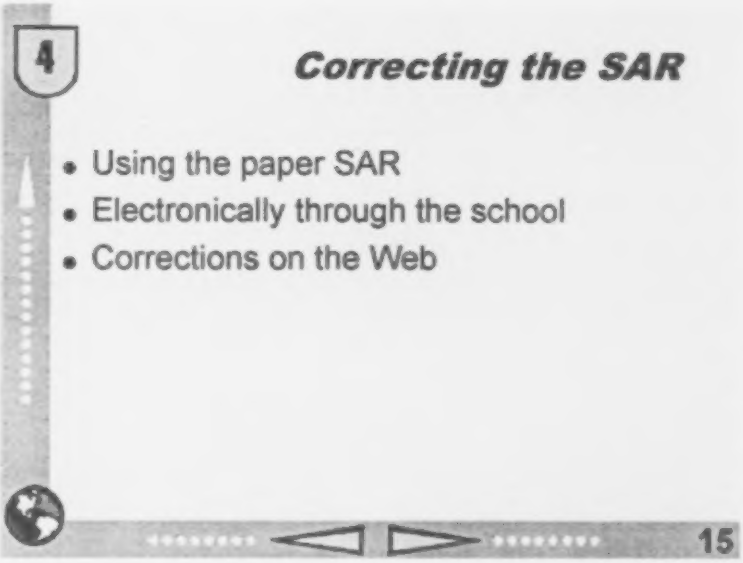
- Locate the EFC
- Part 1 - Information Summary
- Part 2 - Information Review Form

or

- Part 2 - Information Request Form

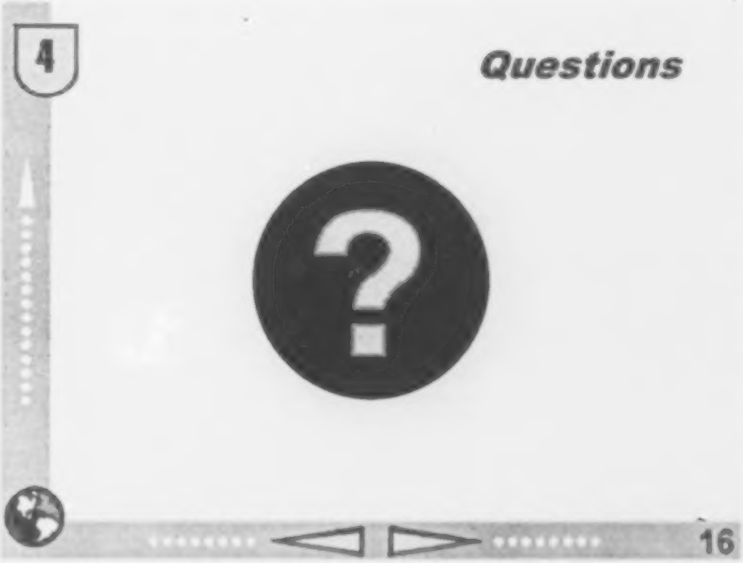
It is important that students review SARs as soon as possible. Any missing or incorrect information will require immediate action, as it will likely affect their potential financial aid package. There are instructions on the SAR for correcting any errors.

Notes



Correcting the SAR

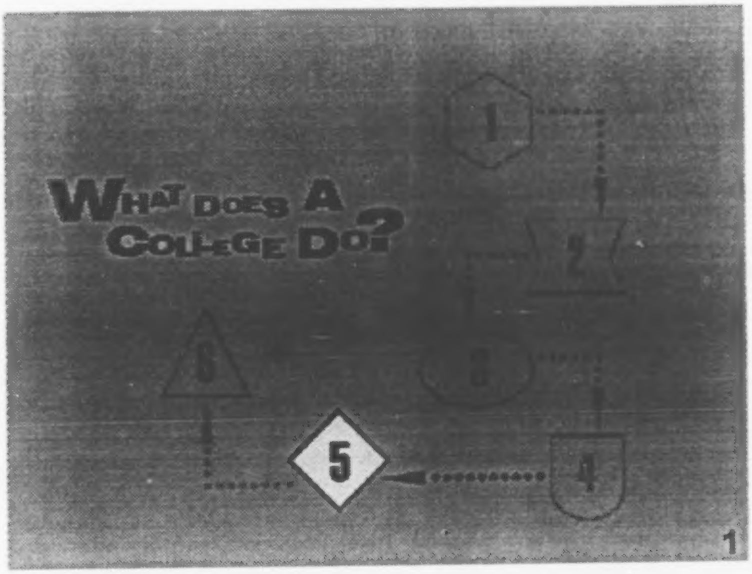
- Using the paper SAR
- Electronically through the school
- Corrections on the Web



Questions

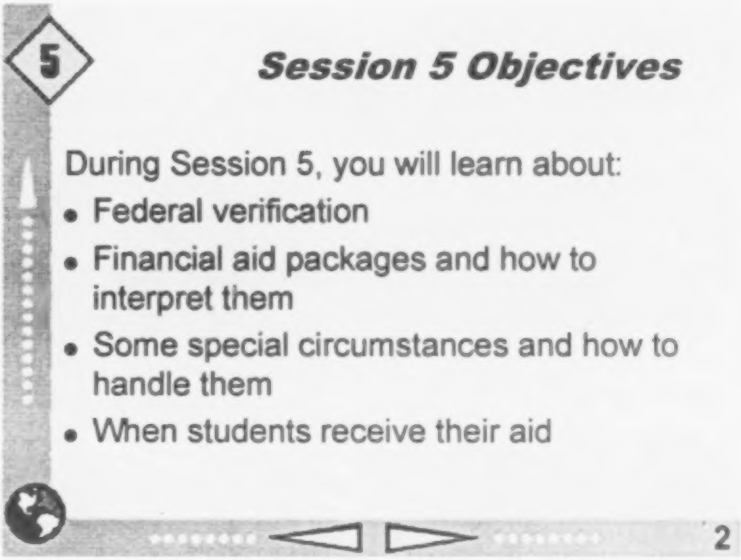
Notes

WHAT DOES A COLLEGE DO?



WHAT DOES A COLLEGE DO?

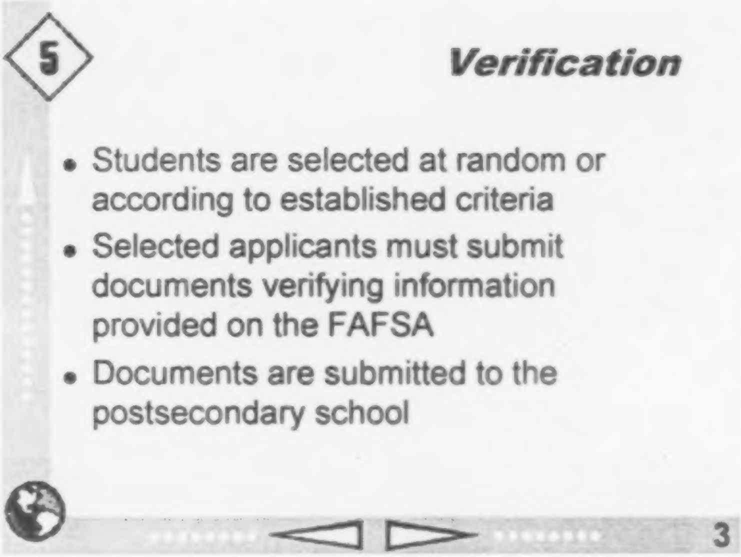
Notes



Session 5 Objectives

During Session 5, you will learn about:

- Federal verification
- Financial aid packages and how to interpret them
- Some special circumstances and how to handle them
- When students receive their aid



5

Verification

- Students are selected at random or according to established criteria
- Selected applicants must submit documents verifying information provided on the FAFSA
- Documents are submitted to the postsecondary school

3

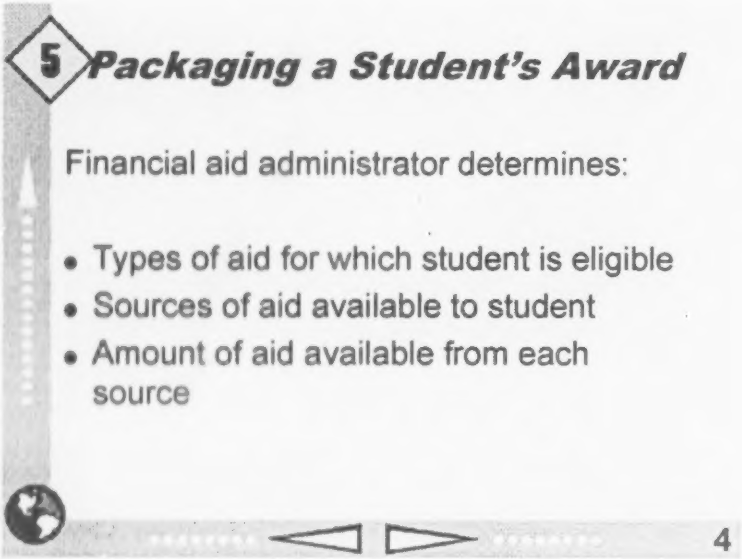
Notes

Students and parents should keep copies of all documents used to fill out financial aid forms, as well as copies of the submitted financial aid forms. A great suggestion for students is to create a special file folder to hold copies of all financial aid information. Keeping good records will save them time and effort in the future.

Students should copy the following types of documents for their records:

- Income tax returns
- Submitted FAFSA
- Loan application/Signed promissory notes
- Loan/disbursement checks
- Signed receipts for cash
- Award letters
- Deferment or forbearance forms
- Loan entrance counseling materials
- Statements of rights and responsibilities regarding loans

Notes

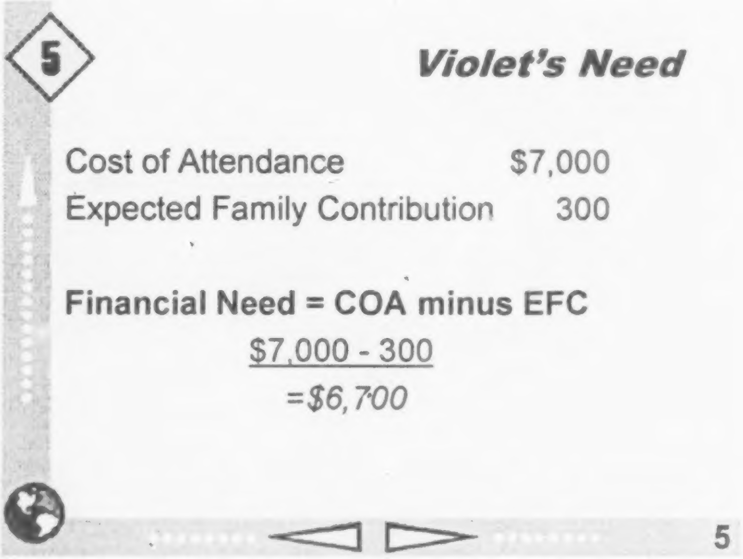


Packaging a Student's Award

Financial aid administrator determines:

- Types of aid for which student is eligible
- Sources of aid available to student
- Amount of aid available from each source

A school's cost of attendance has two components: direct costs (tuition, fees, books, supplies) and indirect costs (food, rent, transportation, etc.)



Violet's Need

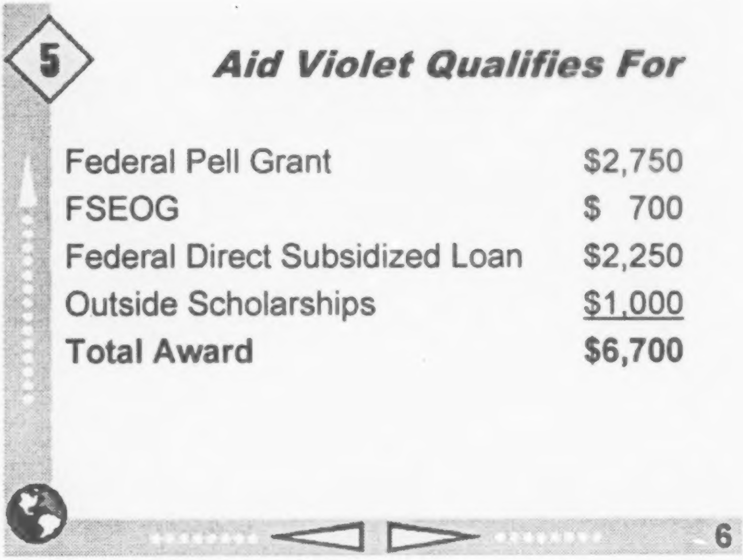
Cost of Attendance	$7,000
Expected Family Contribution	300

Financial Need = COA minus EFC

$7,000 - 300

=$6,700

Notes



5

Aid Violet Qualifies For

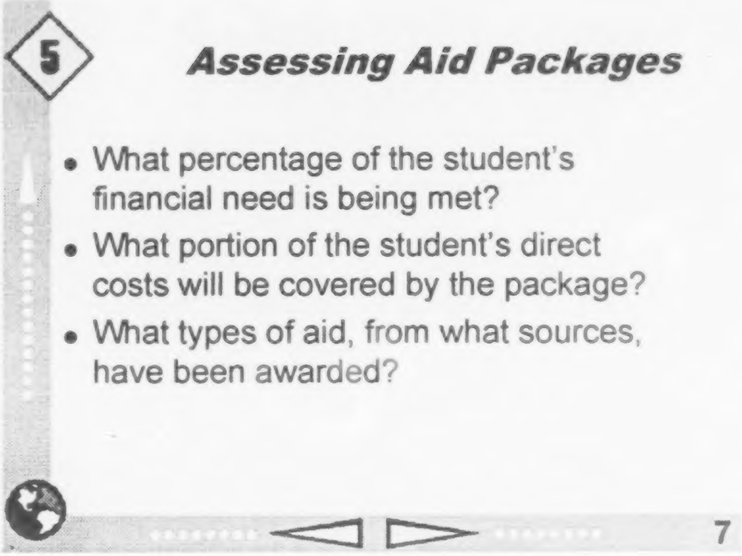
Federal Pell Grant	$2,750
FSEOG	$ 700
Federal Direct Subsidized Loan	$2,250
Outside Scholarships	$1,000
Total Award	**$6,700**

6

Schools package aid differently, taking into account available programs as well as the institution's philosophy regarding student aid. Not only do schools package differently, but many also use different types of award letters. Sometimes schools send a preliminary award letter to the student and a revised award letter at a later date.

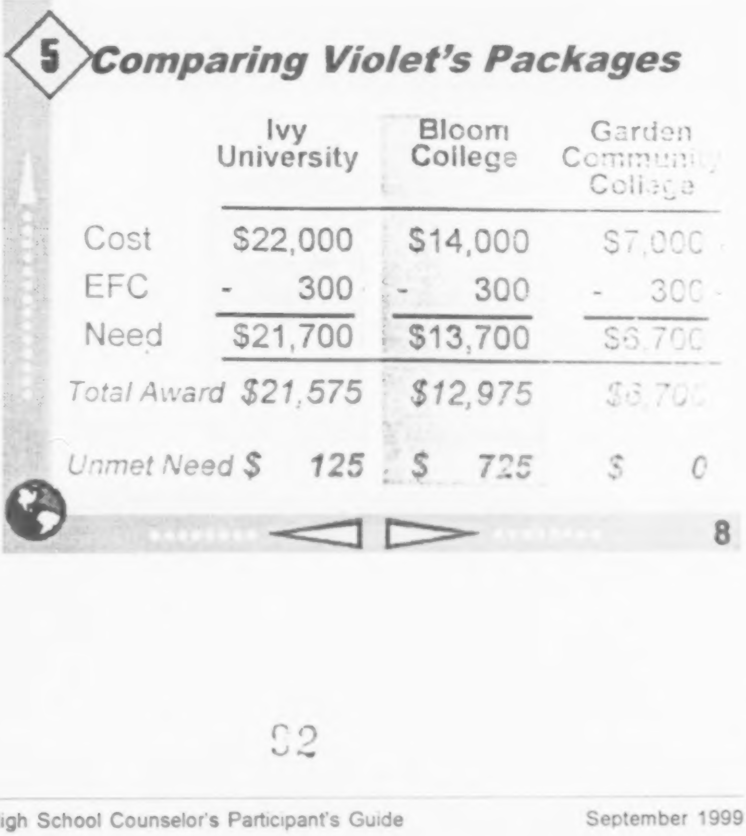
An award letter is **not** a guarantee that a student will receive financial aid, but is usually an offered or planned award. To receive the specified awards, the student must continue to meet all eligibility requirements and comply with any other rules set by the school's financial aid office, such as filling out additional application forms and complying with all deadlines.

Notes



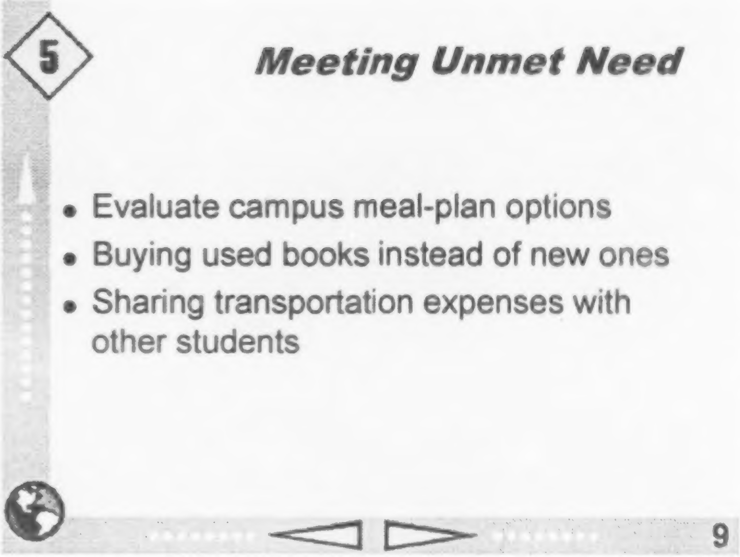
Assessing Aid Packages

- What percentage of the student's financial need is being met?
- What portion of the student's direct costs will be covered by the package?
- What types of aid, from what sources, have been awarded?



Comparing Violet's Packages

	Ivy University	Bloom College	Garden Community College
Cost	$22,000	$14,000	$7,000
EFC	- 300	- 300	- 300
Need	$21,700	$13,700	$6,700
Total Award	*$21,575*	*$12,975*	*$6,700*
Unmet Need	*$ 125*	*$ 725*	*$ 0*



5

Meeting Unmet Need

- Evaluate campus meal-plan options
- Buying used books instead of new ones
- Sharing transportation expenses with other students

9

Notes

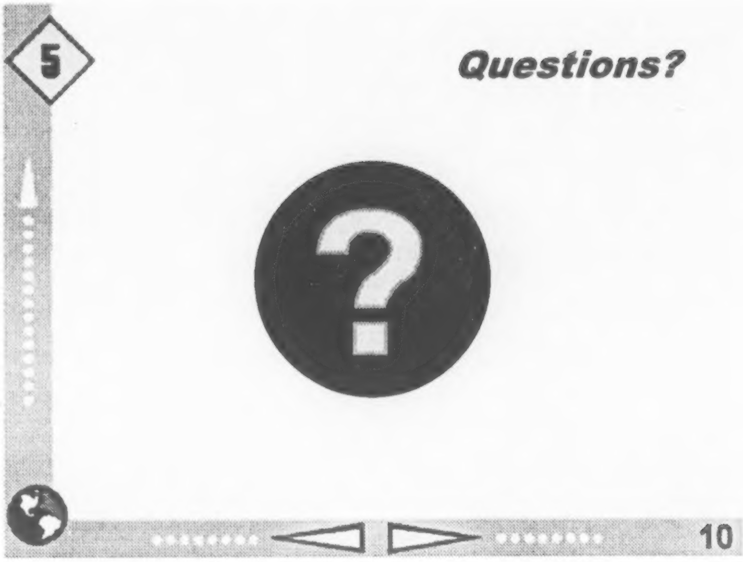
Special Circumstances

Sometimes, a student's family has unusual or unexpected financial circumstances. To address such situations, financial aid administrators **might** be able to make special considerations for students so they can be eligible for additional financial aid. Students should meet with financial aid personnel at their postsecondary school as soon as possible to discuss these situations.

Getting the Money

In most cases, students will receive their federal loans and grants in at least two installments. The money must first be used to pay tuition and fees, room and board, and other school charges. Also, at most schools, first-year undergraduate students may not receive their first federal loan payment until 30 days after the first day of class. Because of the way disbursements are arranged, alert students that they might need to finance their expenses for the first month.

Notes



Questions?

Notes

Vanessa's Award Package

Vanessa receives letters from three schools she is considering, each offering a financial aid package. The award packages are below:

	Great State University	Morgan College	Lovely Community College
Cost of Attendance	$16,000	$21,000	$4,000
EFC	12,000	12,000	12,000
Pell Grant	$0	$0	$0
FSEOG	$0	$0	$0
Perkins Loan	$0	$0	$0
FWS	$2,000	$3,000	$0
Stafford Subsidized	$0	$2,000	$0
Stafford Unsubsidized	$2,625	$625	$2,625
PLUS	$9,375	$11,375	$1,375
Institutional Grant	$2,000	$4,000	$0

What are some of the reasons why the award packages differ?

What should Vanessa consider in choosing one package over the other?

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Notes

Victor's Award Package

Victor receives letters from three schools he is considering, each offering a financial aid package. The award packages are below:

	Creole School of Art and Design	Praline Community College	Pleasant University
Cost of Attendance	$14,000	$6,000	$9,000
EFC	600	600	600
Pell Grant	$2,450	$2,450	$2,450
FSEOG	$1000	$0	$2,000
Perkins Loan	$0	$0	$0
FWS	$4,000	$0	$3,000
Stafford Subsidized	$2,000	$2,000	$0
Stafford Unsubsidized	$0	$0	$0
PLUS	$0	$0	$0
State Grant	$950	$950	$950
Institutional Grant	$1,000	$0	$0

What are some of the reasons why the award packages differ?

What should Victor consider in choosing one package over the other?

Violet's Award Package

Notes

Violet receives letters from three schools she is considering, each offering a financial aid package. The award packages are below:

	Ivy University	Bloom College	Garden Community College
Cost of Attendance	$22,000	$14,000	$7,000
EFC	300	300	300
Pell Grant	$2,750	$2,750	$2,750
FSEOG	$2,000	$3,000	$700
Perkins Loan	$0	$2,000	$0
FWS	$2,325	$0	$0
Stafford Subsidized	$2,625	$2,625	$2,250
Stafford Unsubsidized	$0	$0	$0
PLUS	$0	$0	$0
State Grant	$0	$0	$0
Institutional Grant	$11,000	$2,325	$0
Outside Scholarships	$1,000	$1,000	$1,000

What are some of the reasons why the award packages differ?

What should Violet consider in choosing one package over the other?

Notes

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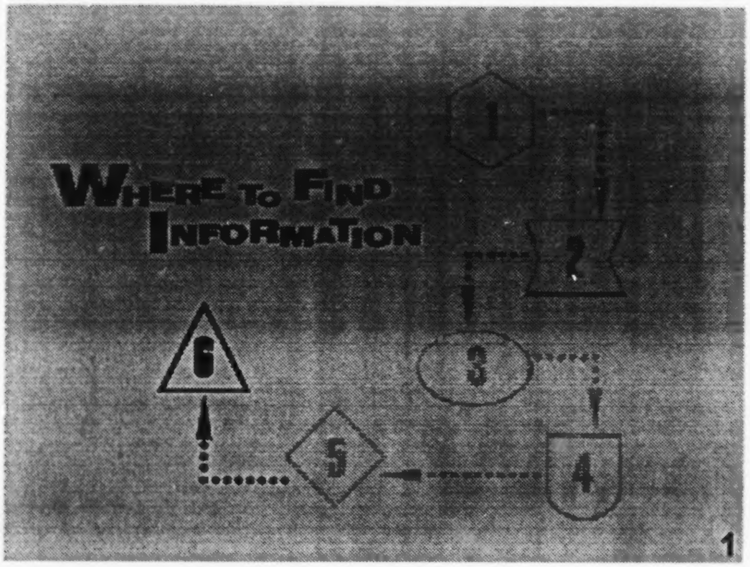
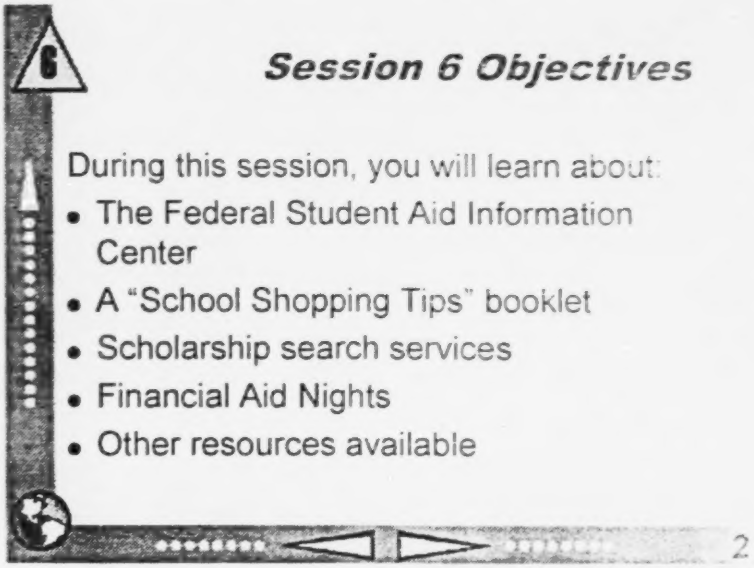
WHERE TO FIND INFORMATION


WHERE TO FIND INFORMATION

1

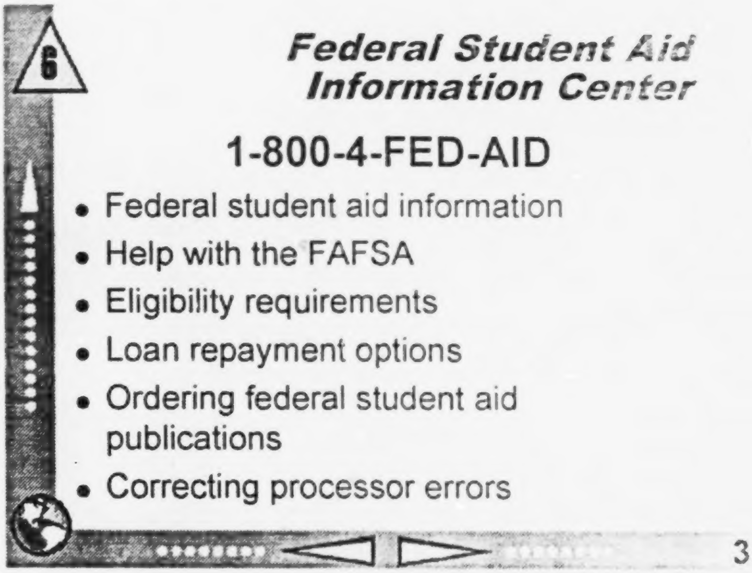
Notes



Session 6 Objectives

During this session, you will learn about:

- The Federal Student Aid Information Center
- A "School Shopping Tips" booklet
- Scholarship search services
- Financial Aid Nights
- Other resources available

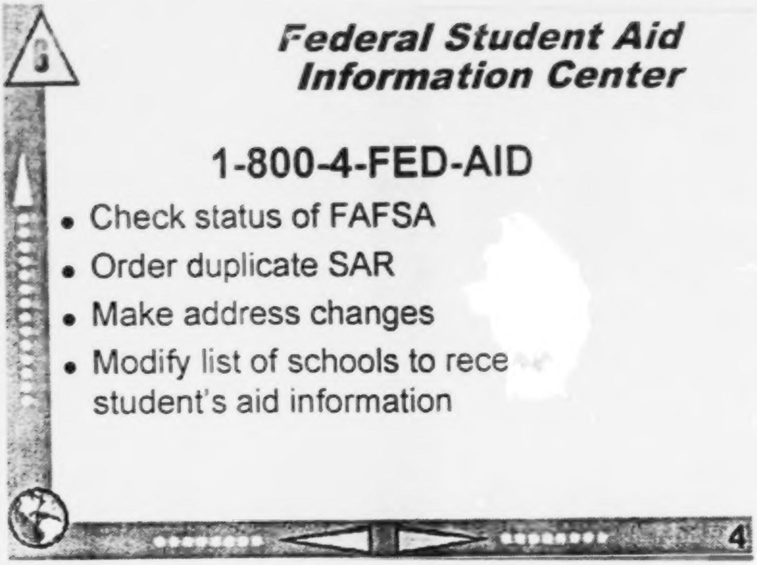


Federal Student Aid Information Center

1-800-4-FED-AID

- Federal student aid information
- Help with the FAFSA
- Eligibility requirements
- Loan repayment options
- Ordering federal student aid publications
- Correcting processor errors

Notes

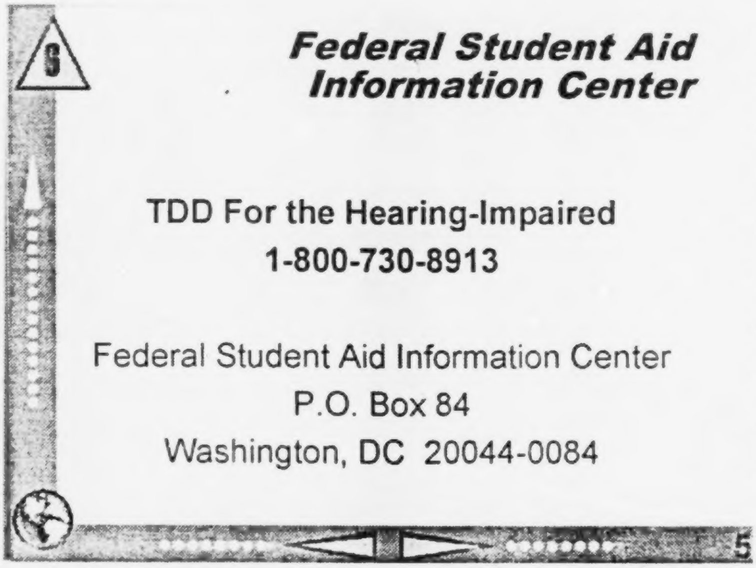


Federal Student Aid Information Center

1-800-4-FED-AID

- Check status of FAFSA
- Order duplicate SAR
- Make address changes
- Modify list of schools to receive student's aid information

The Federal Student Aid Information Center can be called if at least four weeks have passed since a student has mailed in the completed FAFSA or corrected SAR with no response. A student or parent can call this number to check on the status of their FAFSA, or change the names of the schools the applicant requested receive their FAFSA information. Any changes to the permanent mailing address reported on the FAFSA should also be called in to this number. The applicant can also call this number to request a duplicate SAR.

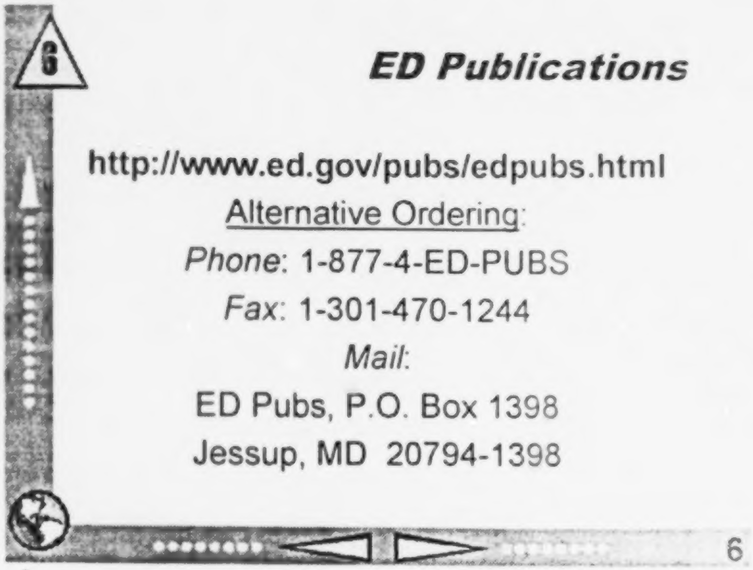


Federal Student Aid Information Center

TDD For the Hearing-Impaired
1-800-730-8913

Federal Student Aid Information Center
P.O. Box 84
Washington, DC 20044-0084

Notes



ED Publications

http://www.ed.gov/pubs/edpubs.html

Alternative Ordering:

Phone: 1-877-4-ED-PUBS

Fax: 1-301-470-1244

Mail:

ED Pubs, P.O. Box 1398
Jessup, MD 20794-1398

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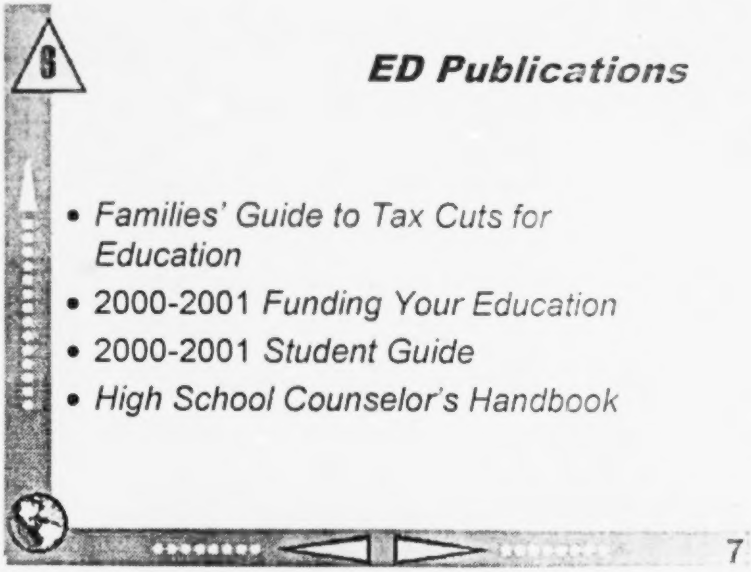


ED Publications

- *Families' Guide to Tax Cuts for Education*
- 2000-2001 *Funding Your Education*
- 2000-2001 *Student Guide*
- *High School Counselor's Handbook*

7

Families' Guide to the 1997 Tax Cuts for Education (Taxpayer Relief Act)
This publication is available at http://www.ed.gov/updates/97918tax.html

2000-2001 Funding Your Education
This publication is available at http://www.ed.gov/prog_info/SFA/FYE

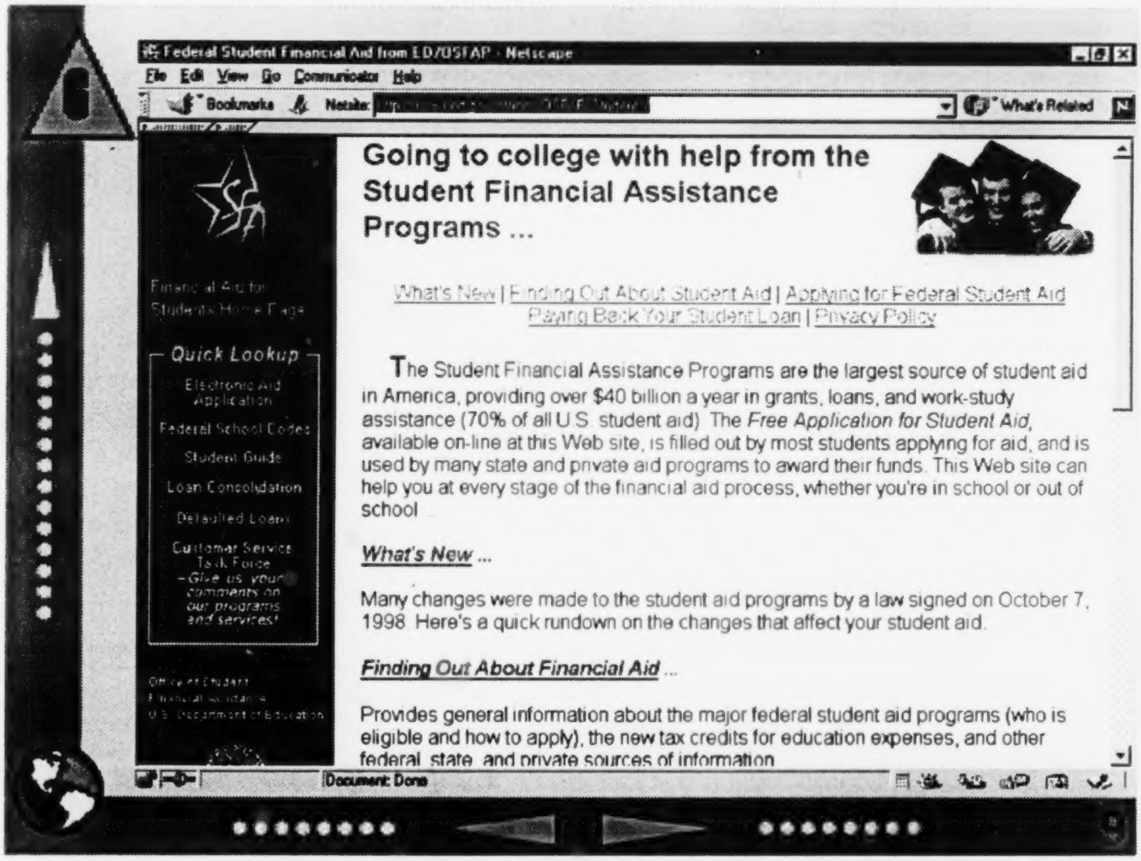
2000-2001 Student Guide
This publication is available at http://www.ed.gov/prog_info/SFA/StudentGuide

Notes

Choosing A School

- ED regulates federal student aid policies only
- Student Right to Know Act
- School Shopping Tips Booklet

8


Federal Student Financial Aid from ED/OSFAP - Netscape
File Edit View Go Communicator Help
Bookmarks
Netsite:
What's Related
Financial Aid for Students Home Page
Quick Lookup
Electronic Aid Application
Federal School Codes
Student Guide
Loan Consolidation
Defaulted Loans
Customer Service Task Force
–Give us your comments on our programs and services!
Office of Student Financial Assistance
U.S. Department of Education
Document: Done

Going to college with help from the Student Financial Assistance Programs ...

What's New | Finding Out About Student Aid | Applying for Federal Student Aid
Paying Back Your Student Loan | Privacy Policy

The Student Financial Assistance Programs are the largest source of student aid in America, providing over $40 billion a year in grants, loans, and work-study assistance (70% of all U.S. student aid). The *Free Application for Student Aid*, available on-line at this Web site, is filled out by most students applying for aid, and is used by many state and private aid programs to award their funds. This Web site can help you at every stage of the financial aid process, whether you're in school or out of school ...

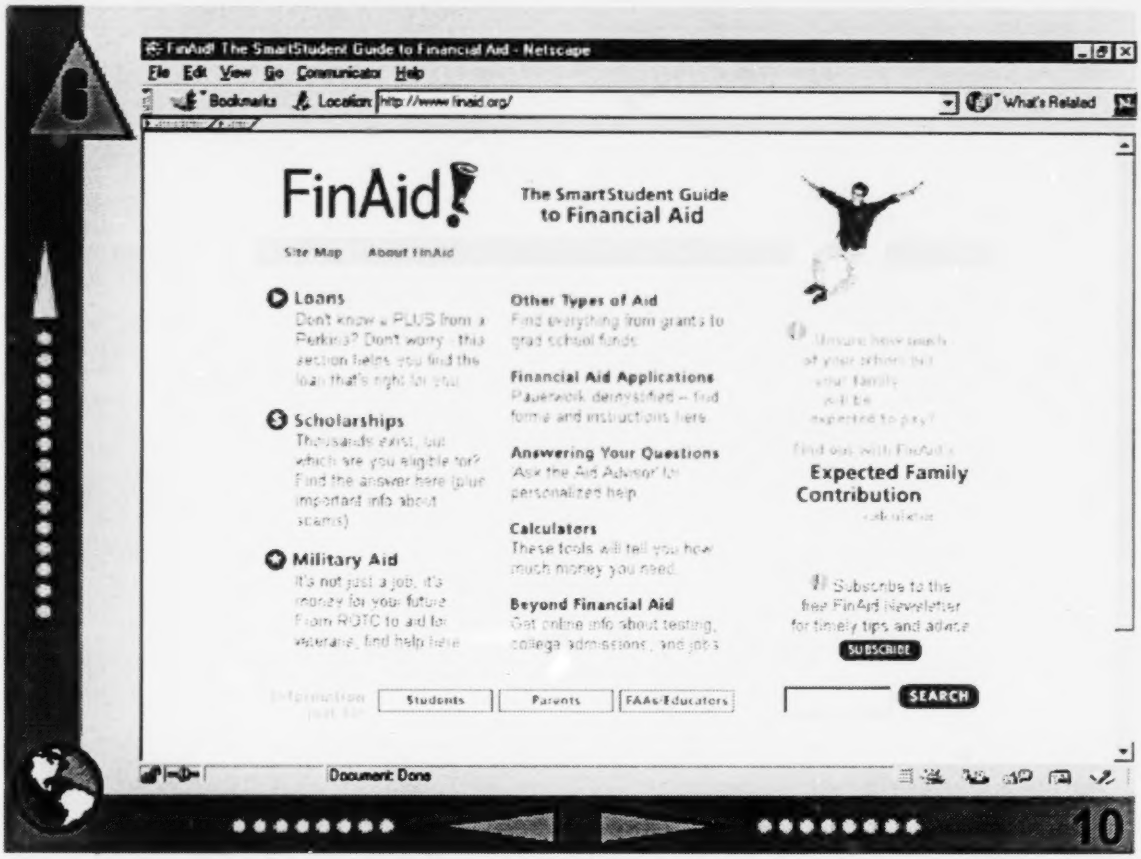
What's New ...

Many changes were made to the student aid programs by a law signed on October 7, 1998. Here's a quick rundown on the changes that affect your student aid.

Finding Out About Financial Aid ...

Provides general information about the major federal student aid programs (who is eligible and how to apply), the new tax credits for education expenses, and other federal, state, and private sources of information

Notes



FinAid! The SmartStudent Guide to Financial Aid - Netscape

Location: http://www.finaid.org/

FinAid! The SmartStudent Guide to Financial Aid

Site Map About FinAid

Loans
Don't know a PLUS from a Perkins? Don't worry - this section helps you find the loan that's right for you.

Scholarships
Thousands exist, but which are you eligible for? Find the answer here (plus important info about scams)

Military Aid
It's not just a job, it's money for your future. From ROTC to aid for veterans, find help here.

Other Types of Aid
Find everything from grants to grad school funds.

Financial Aid Applications
Paperwork demystified – find forms and instructions here.

Answering Your Questions
'Ask the Aid Advisor' for personalized help.

Calculators
These tools will tell you how much money you need.

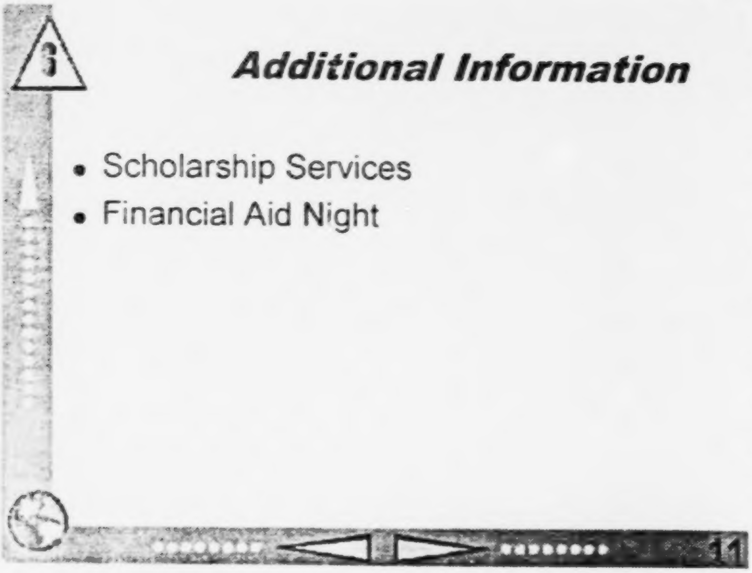
Beyond Financial Aid
Get online info about testing, college admissions, and jobs.

Unsure how much of your school bill your family will be expected to pay? Find out with FinAid's **Expected Family Contribution** calculator

Subscribe to the free FinAid Newsletter for timely tips and advice

According to the Federal Trade Commission, unscrupulous companies typically guarantee or promise scholarships or grants. Legitimate companies never guarantee or promise scholarships or grants. For more information on scholarship fraud, you can contact the Federal Trade Commission (http://www.ftc.gov). For information about spotting, stopping, or reporting a scam, contact the National Fraud Information Center at 1-800-876-7060.

Notes



Additional Information

- Scholarship Services
- Financial Aid Night

Activity

Web
Scholarship
Search

Instructions:

1. Go to http://www.finaid.org
2. Click on "Scholarships."
3. Click on "Fast Web."
4. Conduct a scholarship search for Vanessa, Victor or Violet.

Notes

Questions

Acronyms

AOS
Application Ordering System

COA
Cost of Attendance

EFC
Expected Family Contribution

FAA
Financial Aid Administrator

FAFSA
Free Application for Federal Student Aid

FFEL Program
Federal Family Education Loan Program

FSEOG
Federal Supplemental Educational Opportunity Grant

FWS
Federal Work Study

GED
General Education Development certificate

HPSL

Health Professions Student Loan

NACAC

National Association for College Admission Counseling

NSL Program

Nursing Student Loan Program

PHS

Public Health Service

PLUS

This acronym formerly stood for Parent Loans for Undergraduate Students; however the program has been renamed the PLUS Program.

ROTC

Reserve Officer Training Corps

SAR

Student Aid Report

SDS

Scholarships for Disadvantaged Students

Getting Help

AmeriCorps

This program allows participants to earn education awards in return for national service.

The Corporation for National and Community Service
1201 New York Avenue, NW
Washington, DC 20525
1-800-94-ACORPS (1-800-942-2677)
http://www.cns.gov/americorps

American Legion's Need a Lift?

This publication provides information on student assistance. There is a fee of $3.00, plus $1.95 for shipping.

ATTN: Emblem Sales
The American Legion
P.O. Box 1050
Indianapolis, IN 46206
1-888-453-4466

Application Ordering System (AOS) Hotline

Call this hotline to place bulk orders of the FAFSA and to check the status of your order.

1-800-284-2788

Closed School Information

You can call the Closed School Information hotline to receive information about a closed school.

1-800-CLOSE-IN (1-800-256-7346)

Credit Bureau Disputes

To dispute inaccurate or incomplete information on a credit report, contact the Division of Credit Practices.

Division of Credit Practices
Bureau of Consumer Protection
Federal Trade Commission
Washington, DC
(202)326-2222

Department of State

If a student was born abroad to parents who are U.S. citizens, the Social Security Administration's (SSA) database may not have been updated even if the student's birth was registered. The student can submit a Certificate of Birth Abroad as proof of U.S. citizenship. They can contact the Department of State for a copy of the certificate.

Department of State
Passport Correspondence Branch
1111 19th Street, SW, #510
Washington, DC 20522-1705
(202)955-0737

FAFSA Express

To order FAFSA Express on diskette, call:

1-800-801-0576

Students can also download a copy of this product from the FAFSA Express web site at:

http://www.ed.gov/offices/OSFAP/Students/apply/fexpress.html

FAFSA on the Web

http://www.fafsa.ed.gov

For general information and technical assistance, call:

1-800-801-0576

Federal School Codes

Students can either call the Federal Student Aid Information Center or access the Internet for a listing of current Title IV School Codes. This information is necessary for completing the FAFSA.

1-800-4-FED-AID

http://www.ed.gov/offices/OSFAP/students/apply/search.html
or
http://www.ed.gov and click on "Federal School Codes"

Financial Aid Administrators

Financial aid administrators can be invaluable. Most will help students complete the FAFSA, review the SAR, and discuss options. Students and parents should develop a relationship with a financial aid professional at the school the student will be attending.

Federal Student Aid Information Center

Contact this center for general information about federal student financial aid, for help in completing the FAFSA, to get financial aid literature, check on the status of a FAFSA, or to request a SAR.

Federal Student Aid Information Center
P.O. Box 84
Washington, DC 20044-0084
1-800-4-FED-AID
(1-800-433-3243)
1-800-730-8913 (TDD number for hearing-impaired individuals)

Funding Your Education

This document provides general information about the U.S. Department of Education's federal student financial aid programs for high school students and others considering entering a postsecondary school for the first time.

1-800-284-2789

http://www.ed.gov/prog_info/SFA/FYE

Getting Ready for College Early

For information on the importance of getting ready for college early, especially for middle school students, call the following telephone number:

1-800-USA-LEARN

The Department also has a publication entitled *Getting Ready for College Early*, available at http://www.ed.gov/pubs/GettingReadyCollegeEarly.

Help in Completing the FAFSA

Students can either call the Federal Student Aid Information Center or use the Internet for help in completing the FAFSA.

1-800-4-FED-AID

http://www.ed.gov/prog_info/SFA/FAFSA

High School Counselor's Handbook

This is your main guide for handling questions students may have about applying for and receiving aid for postsecondary education.The 2000-2001 edition will be available in January 2000. For additional copies call the Federal Student Aid Information Center.

1-800-4-FED-AID

Inspector General's Hotline

Call this number if you suspect any fraud, waste, or abuse involving federal student aid funds.

1-800-MIS-USED (1-800-647-8733)

Make it Happen!

This resource is a guide for students in grades 8 through 10. There is a slight fee for the material. It can be ordered from the following address.

The Education Resources Institute (TERI)
Higher Education Information Center
Youth Programs Department
330 Stuart Street, Suite 500
Boston, MA 02116
(617)542-3900, extension 200

National Association for College Admission Counseling (NACAC)

You can order a number of useful publications from this organization such as *A Guide to the College Admission Process*, and *Guide for Parents*. Some of the documents are not free.

NACAC Publications/Media
P.O. Box 18214
Merrifield, VA 22118-0214
(703)836-2222

Occupational Outlook Handbook

This handbook is published by the U.S. Department of Labor and is a good career resource to share with your students. There is a cost for this book. It is available in paperback, hardcover, CD-ROM, and on the Internet.

U.S. Department of Labor
Bureau of Labor Statistics Publication Sales Center
P.O. Box 2145
Chicago, IL 60690
(312)353-1880
http://stats.bls.gov

A copy of the *Occupational Outlook Quarterly*, a quarterly periodical published by this agency, can be ordered from the same address. Single copies are free, but there is a subscription charge.

The United States Presidential Scholars Program

The Presidential Scholars Program recognizes students who demonstrate exceptional talent in the visual, creative, and performing arts. For more information, call:

(202)401-0961

U.S. Public Health Service (PHS)

This agency provides funding for students pursuing degrees in the health professions. Students should contact the school's financial aid office or the PHS.

U.S. Department of Health and Human Services
U.S. Public Health Service
Health Resources and Services Administration
Bureau of Health Professions
Division of Student Assistance, #834
5600 Fishers Lane
Rockville, MD 20857
(301)443-4776 (Office for Campus Based Programs)

U.S. Armed Forces

Scholarships are available through Reserve Officer Training Corps (ROTC) programs. These programs provide college-trained officers for various branches of the military.

Army Reserve Officer Training Corps (ROTC)
Army ROTC
Gold Quest Center
P.O. Box 3279
Warminster, PA 18974-0128
1-800-USA-ROTC

Air Force ROTC
HQ AFROTC\RROO
551 East Maxwell Blvd.
Maxwell AFB, AL 36112-6106

Naval Reserve Officer Training Corps (NROTC)
Commander, Navy Recruiting Command/Code 314
4015 Wilson Blvd.
Arlington, VA 22203
1-800-NAV-ROTC

Workforce Investment Act (WIA)

This act is administered by the Department of Labor through the states and provides funding for job training. For information, call your state employment agency.

http://usworkforce.org

CASE STUDIES

Meet Vanessa Williamson...

Vanessa N. Williamson, a senior at Yerkin High School in Morgan, California, knows that she will be attending a college next year. Both her parents have professional careers, and have emphasized to her the importance of a college education. She's unsure, though, about her career aspirations or her likely college major. She may want to follow her father and become a teacher. But, she's not sure, and believes she has plenty of time before she needs to decide. Vanessa's first choice is Great State University, where many of her friends who graduated last year go to school. She will consider other schools, as long as they are close enough to home so she can return to her family and friends on weekends.

Vanessa has an older brother, who is attending college full-time, and a younger sister who is a freshman in high school. Her parents have managed to save $5,000 for her college education. They know that won't be enough, and are concerned that Vanessa won't qualify for student aid. Vanessa's father, Vince, is an elementary school teacher and her mother, Veronica, is a real estate attorney for a small firm in Morgan. Together, they earned about $125,000 last year. Vanessa is an average student, and they do not believe she will qualify for any merit-based scholarships.

Completing the FAFSA—Vanessa

Vanessa was born on December 25, 1982. She and her parents are U.S. citizens. Vanessa is about to finish her senior year and will graduate in June. Her mother is 47 years old and her father is 50 years old. Both parents are college graduates.

Vanessa's Social Security Number and driver's license numbers are the same: 999-12-1234. Her home telephone number is 707-555-5377. She has never been convicted of an illegal drug offense.

Vanessa's parents' only income for 1999 was what they reported on their 1999 IRS Form 1040. They reported five exemptions and an Adjusted Gross Income (AGI) of $125,965. Her father earned $60,965 and her mother earned $65,000. They paid $24,228 in taxes. The money they have saved for Vanessa's education is in investments with a net worth of $5,000. They have $5,000 in cash, savings and checking accounts.

Vanessa didn't work during 1999, so she didn't file a tax return. She does not have any money in a savings or checking account. Vanessa lives with her parents at 1209 Downtha Road, Morgan, CA 98765. They moved to California shortly before Vanessa's older brother was born. She plans to attend college full-time in the fall and spring semesters, and will probably live on campus. She is considering a work-study job to have some spending money.

Even though Vanessa thinks she'll probably go to Great State University, her guidance counselor suggested she apply to additional institutions to expand her options. Vanessa has applied to the following three schools:

Great State University
5050 Great Street
Collegetown, CA 94187
Federal School Code: 678345

Vanessa would live on campus at Great State University.

Morgan College
2000 Hilltop Drive
Morgan, CA 98765
Federal School Code: 333444

Vanessa would live at home since Morgan College is in her hometown.

Lovely Community College
3963 Worth Lane
Lovely, CA 90356
Federal School Code: 011375

Vanessa would live with her grandparents, who live nearby.

Form **1040** Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return **1999** (99) IRS Use Only—Do not write or staple in this space

For the year Jan. 1-Dec. 31, 1999, or other tax year beginning , 1999, ending , OMB No. 1545-0074

Proof as of 5/10/1999

Label (See instructions on page 18.)
Use the IRS label. Otherwise, please print or type.

LABEL HERE

Your first name and initial: Vince A
Last name: Williamson
Your social security number: 222 : 22 : 2222

If a joint return, spouse's first name and initial: Veronica B
Last name: Williamson
Spouse's social security number: 333 : 33 : 3333

Home address (number and street). If you have a P.O. box, see page 18: 1209 Downtha Road
Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, see page 18: Morgan CA 98765

▲ **IMPORTANT!** ▲ You **must** enter your SSN(s) above.

Presidential Election Campaign (See page 18.)

	Yes	No
Do you want $3 to go to this fund?		
If a joint return, does your spouse want $3 to go to this fund?		

Note: *Checking "Yes" will not change your tax or reduce your refund.*

Filing Status

Check only one box.

1 ☐ Single
2 ☐ Married filing joint return (even if only one had income)
3 ☐ Married filing separate return. Enter spouse's social security no. above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See page 18.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child (year spouse died ▶ 19). (See page 18.)

Exemptions

6a ☐ **Yourself.** If your parent (or someone else) can claim you as a dependent on his or her tax return, **do not check box 6a**.
b ☐ **Spouse**

No. of boxes checked on 6a and 6b: 2

c **Dependents:**

If more than six dependents, see page 19.

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 19)
Vance	Williamson	444 : 44 : 4444	son	☐
Vanessa	Williamson	999 : 12 : 1234	daughter	☐
Velma	Williamson	555 : 55 : 5555	daughter	☐
				☐
				☐
				☐

No. of your children on 6c who:
- lived with you: 3
- did not live with you due to divorce or separation (see page 19)

Dependents on 6c not entered above

d Total number of exemptions claimed

Add numbers entered on lines above ▶ 5

Income

Attach Copy B of your Forms W-2 and W-2G here. Also attach Form 1099-R if tax was withheld.

If you did not get a W-2, see page 20.

Enclose, but do not staple, any payment. Also, please use **Form 1040-V.**

7	Wages, salaries, tips, etc. Attach Form(s) W-2		7	125,965	00
8a	**Taxable** interest. Attach Schedule B if required		8a	200	00
b	**Tax-exempt** interest. DO NOT include on line 8a	8b			
9	Ordinary dividends. Attach Schedule B if required		9	0	00
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 21)		10	0	00
11	Alimony received		11	0	00
12	Business income or (loss). Attach Schedule C or C-EZ		12	0	00
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ ☐		13	0	00
14	Other gains or (losses). Attach Form 4797		14	0	00
15a	Total IRA distributions	15a	b Taxable amount (see page 22) 15b	0	00
16a	Total pensions and annuities	16a	b Taxable amount (see page 22) 16b	0	00
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		17	0	00
18	Farm income or (loss). Attach Schedule F		18	0	00
19	Unemployment compensation		19	0	00
20a	Social security benefits	20a	b Taxable amount (see page 24) 20b	0	00
21	Other income. List type and amount (see page 24)		21	0	00
22	Add the amounts in the far right column for lines 7 through 21. This is your **total income** ▶		22	126,165	00

Adjusted Gross Income

23	IRA deduction (see page 25)	23	0 00		
24	Student loan interest deduction (see page 27)	24	200 00		
25	Medical savings account deduction. Attach Form 8853	25	0 00		
26	Moving expenses. Attach Form 3903	26	0 00		
27	One-half of self-employment tax. Attach Schedule SE	27	0 00		
28	Self-employed health insurance deduction (see page 28)	28	0 00		
29	Keogh and self-employed SEP and SIMPLE plans	29	0 00		
30	Penalty on early withdrawal of savings	30	0 00		
31a	Alimony paid b Recipient's SSN ▶	31a	0 00		
32	Add lines 23 through 31a			32	200 00
33	Subtract line 32 from line 22. This is your **adjusted gross income** ▶			33	125,965 00

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 51. Cat. No. 11320B Form **1040** (1999)

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Proof as of 6/01/1999

Standard Deduction for Most People

Single: $4,300

Head of household: $6,350

Married filing jointly or Qualifying widow(er): $7,200

Married filing separately: $3,600

Tax and Credits	34	Amount from line 33 (adjusted gross income)	34	125,965	00
	35a	Check if: ☐ **You** were 65 or older, ☐ Blind; ☐ **Spouse** was 65 or older, ☐ Blind. Add the number of boxes checked above and enter the total here ▶ 35a ☐			
	b	If you are married filing separately and your spouse itemizes deductions or you were a dual-status alien, see page 29 and check here ▶ 35b ☐			
	36	Enter the **larger** of your **itemized deductions** from Schedule A, line 28, **OR standard deduction** shown on the left. **But** see page 30 to find your standard deduction if you checked any box on line 35a or 35b **or** if someone can claim you as a dependent	36	7,100	00
	37	Subtract line 36 from line 34	37	118,865	00
	38	If line 34 is $94,975 or less, multiply $2,750 by the total number of exemptions claimed on line 6d. If line 34 is over $94,975, see the worksheet on page 30 for the amount to enter	38	13,500	00
	39	**Taxable income.** Subtract line 38 from line 37. If line 38 is more than line 37, enter -0-	39	105,365	00
	40	**Tax.** (see page 30) Check if any tax is from a ☐ Form(s) 8814 b ☐ Form 4972 ▶	40	24,228	00
	41	Credit for child and dependent care expenses. Attach Form 2441	41		
	42	Credit for the elderly or the disabled. Attach Schedule R	42		
	43	Child tax credit (see page 31)	43		
	44	Education credits. Attach Form 8863	44		
	45	Adoption credit. Attach Form 8839	45		
	46	Foreign tax credit. Attach Form 1116 if required	46		
	47	Other. Check if from a ☐ Form 3800 b ☐ Form 8396 c ☐ Form 8801 d ☐ Form (specify) ______	47		
	48	Add lines 41 through 47. These are your **total credits**	48	0	00
	49	Subtract line 48 from line 40. If line 48 is more than line 40, enter -0- ▶	49	24,228	00
Other Taxes	50	Self-employment tax. Attach Schedule SE	50	0	00
	51	Alternative minimum tax. Attach Form 6251	51	0	00
	52	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	52	0	00
	53	Tax on IRAs, other retirement plans, and MSAs. Attach Form 5329 if required	53	0	00
	54	Advance earned income credit payments from Form(s) W-2	54	0	00
	55	Household employment taxes. Attach Schedule H	55	0	00
	56	Add lines 49 through 55. This is your **total tax** ▶	56	0	00
Payments	57	Federal income tax withheld from Forms W-2 and 1099	57	19000	00
	58	1999 estimated tax payments and amount applied from 1998 return	58	0	00
	59a	**Earned income credit.** Attach Schedule EIC if you have a qualifying child b Nontaxable earned income: amount ▶ ______ and type ▶ ______	59a	0	00
	60	Additional child tax credit. Attach Form 8812	60	0	00
	61	Amount paid with Form 4868 (request for extension)	61	0	00
	62	Excess social security and RRTA tax withheld (see page 43)	62	0	00
	63	Other payments. Check if from a ☐ Form 2439 b ☐ Form 4136	63	0	00
	64	Add lines 57, 58, 59a, and 60 through 63. These are your **total payments** ▶	64	19,000	00
Refund	65	If line 64 is more than line 56, subtract line 56 from line 64. This is the amount you **OVERPAID**	65	0	00
Have it directly deposited! See page 44 and fill in 66b, 66c, and 66d.	66a	Amount of line 65 you want **REFUNDED TO YOU** ▶	66a	0	00
	▶ b	Routing number ☐☐☐☐☐☐☐☐☐ ▶ c Type: ☐ Checking ☐ Savings			
	▶ d	Account number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐			
	67	Amount of line 65 you want **APPLIED TO YOUR 2000 ESTIMATED TAX** ▶	67		
Amount You Owe	68	If line 56 is more than line 64, subtract line 64 from line 56. This is the **AMOUNT YOU OWE**. For details on how to pay, see page 44 ▶	68	5228	00
	69	Estimated tax penalty. Also include on line 68	69		

Sign Here

Joint return? See page 18. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature	Date	Your occupation	Daytime telephone number (optional) ( )
Spouse's signature. If a joint return, BOTH must sign	Date	Spouse's occupation	

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed) and address			EIN
			ZIP code

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2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

999-12-1234
WI-01 DRN: 1234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report

000117C041

VANESSA N. WILLIAMSON
1209 DOWNTHA RD
MORGAN, CA 98765

JANUARY 30, 2000
EFC: 12000

Read this letter carefully and review each item on Part 2 of this Student Aid Report (SAR). Follow the instructions at the top of Part 2 and in the Free Application for Federal Student Aid (FAFSA) instruction booklet to help you make corrections. If all of the information on your SAR is correct, you do not need to return it to the Federal Student Aid Programs. For additional help with your SAR, contact your Financial Aid Administrater (FAA) at your school or the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-443-3243).

We have applied a formula to the information from the form you submitted. The result of this formula will be used by your school to determine your eligibility for most types of Federal student aid. See your FAA to determine what types of student aid you may be able to receive. Based on the information you gave us, you are not eligible for a Federal Pell Grant. All the schools listed on this SAR will receive an electronic report of your financial aid information. Unless a school informs you otherwise, you do not need to submit this SAR to any school. Keep the SAR in case you need to make corrections, or if you decide to attend a school that is not listed.

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This section contains information from your student aid application (shaded items display parents' information, if provided). Use the Information Review Form (Part 2 of your SAR) to correct this information. Do not make corrections on this page; it is for your files.

1. LAST NAME	WILLIAMSON
2. FIRST NAME	VANESSA
3. MIDDLE INITIAL	W
4. PERMANENT STREET ADDRESS	1209 DOWNTHA RD
5. CITY	MORGAN
6. STATE ABBREVIATION	CA
7. ZIP CODE	98765
8. SOCIAL SECURITY NUMBER	999-12-1234
9. DATE OF BIRTH	DECEMBER 25, 1982
10. PERMANENT HOME PHONE NUMBER	(707) 555-5377
11. DO YOU HAVE A DRIVER'S LICENSE?	YES
12. DRIVER'S LICENSE NUMBER	999-12-1234
13. DRIVER'S LICENSE STATE ABBREVIATION	CA
14. CITIZENSHIP STATUS	U.S. CITIZEN
15. ALIEN REGISTRATION NUMBER	(BLANK)
16. MARITAL STATUS	SINGLE
17. DATE OF MARITAL STATUS	(BLANK)
18. ENROLLMENT STATUS SUMMER TERM 2000	NOT ATTENDING
19. ENROLLMENT STATUS FALL SEM/QTR 2000	FULL TIME
20. ENROLLMENT STATUS WINTER QTR 2000-2001	NOT ATTENDING
21. ENROLLMENT STATUS SPRING SEM/QTR 2001	FULL TIME
22. ENROLLMENT STATUS SUMMER TERM 2001	NOT ATTENDING
23. FATHER'S EDUCATIONAL LEVEL	COLLEGE OR BEYOND
24. MOTHER'S EDUCATIONAL LEVEL	COLLEGE OR BEYOND
25. STATE OF LEGAL RESIDENCE ABBREVIATION	CA
26. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
27. DATE YOU BECAME A LEGAL RESIDENT	(BLANK)
28. DRUG CONVICTION ELIGIBILITY?	(BLANK)
29. ARE YOU MALE?	NO
30. REGISTER YOU FOR SELECTIVE SERVICE?	(BLANK)
31. TYPE OF DEGREE/CERTIFICATE	1ST BA
32. GRADE LEVEL IN COLLEGE IN 2000-2001	1ST NEVER ATTENDED
33. HIGH SCHOOL DIPLOMA OR GED?	YES
34. FIRST BACHELOR'S DEGREE BY 7-1-2000?	NO
35. INTERESTED IN STUDENT LOANS?	YES
36. INTERESTED IN WORK-STUDY?	YES
37. FILED 1999 IRS INCOME TAX RETURN	WILL NOT FILE
38. TYPE OF 1999 TAX FORM USED	(BLANK)
39. ELIGIBLE TO FILE A 1040A OR 1040EZ?	(BLANK)
40. ADJUSTED GROSS INCOME FROM IRS FORM	$ (BLANK)
41. U.S. INCOME TAX PAID	$ (BLANK)
42. EXEMPTIONS CLAIMED	00
43. EARNED INCOME CREDIT	$ 0
44. STUDENT'S INCOME EARNED FROM WORK	$ 0
45. SPOUSE'S INCOME EARNED FROM WORK	$ 0
46. AMOUNT FROM WORKSHEET A	$ 0
47. AMOUNT FROM WORKSHEET B	$ 0
48. CASH, SAVINGS, AND CHECKING	$ 0
49. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 0
50. NET WORTH OF BUSINESS	$ 0
51. NET WORTH OF INVESTMENT FARM	$ 0
52. HOW MANY MONTHS RECEIVE VA BENEFITS?	00

53. MONTHLY VA EDUCATION BENEFITS AMOUNT	$ 0
54. BORN BEFORE 1-1-1977?	NO
55. WORKING ON DEGREE BEYOND BACHELOR'S?	NO
56. ARE YOU MARRIED?	NO
57. HAVE DEPENDENTS OTHER THAN SPOUSE?	NO
58. ORPHAN OR WARD OF COURT?	NO
59. VETERAN OF U.S. ARMED FORCES?	NO
60. PARENT(S) MARITAL STATUS	MARRIED
61. YOUR FATHER'S SOCIAL SECURITY NUMBER	222-22-2222
62. YOUR FATHER'S LAST NAME	WILLIAMSON
63. YOUR MOTHER'S SOCIAL SECURITY NUMBER	333-33-3333
64. YOUR MOTHER'S LAST NAME	WILLIAMSON
65. NUMBER OF FAMILY MEMBERS IN 2000-2001	05
66. NUMBER IN COLLEGE IN 2000-2001	2
67. PARENT(S) STATE OF LEGAL RESIDENCE	CA
68. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
69. DATE PARENT(S) BECAME LEGAL RESIDENT	(BLANK)
70. AGE OF OLDER PARENT	50
71. PARENT(S) FILED 1999 INCOME TAX RETURN	ALREADY FILED
72. TYPE OF 1999 TAX FORM USED	1040
73. ELIGIBLE TO FILE A 1040A OR 1040EZ?	NO/DON'T KNOW
74. ADJUSTED GROSS INCOME FROM IRS FORM	$ 125,965
75. U.S. INCOME TAX PAID	$ 19,000
76. EXEMPTIONS CLAIMED	05
77. EARNED INCOME CREDIT	$ 0
78. FATHER'S INCOME EARNED FROM WORK	$ 60,965
79. MOTHER'S INCOME EARNED FROM WORK	$ 65,000
80. AMOUNT FROM WORKSHEET A	$ 0
81. AMOUNT FROM WORKSHEET B	$ 0
82. CASH, SAVINGS, AND CHECKING	$ 5,000
83. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 5,000
84. NET WORTH OF BUSINESS	$ 0
85. NET WORTH OF INVESTMENT FARM	$ 0
86. NUMBER OF FAMILY MEMBERS IN 2000-2001	(BLANK)
87. NUMBER IN COLLEGE IN 2000-2001	(BLANK)
88. FIRST COLLEGE NAME	GREAT STATE UNIVERSITY
89. FIRST HOUSING PLANS	ON CAMPUS
90. SECOND COLLEGE NAME	MORGAN COLLEGE
91. SECOND HOUSING PLANS	WITH PARENT(S)
92. THIRD COLLEGE NAME	LOVELY COMMUNTIY COLLEGE
93. THIRD HOUSING PLANS	OFF CAMPUS
94. FOURTH COLLEGE NAME	(BLANK)
95. FOURTH HOUSING PLANS	(BLANK)
96. FIFTH COLLEGE NAME	(BLANK)
97. FIFTH HOUSING PLANS	(BLANK)
98. SIXTH COLLEGE NAME	(BLANK)
99. SIXTH HOUSING PLANS	(BLANK)
100. DATE COMPLETED	JANUARY 27, 2000
101. SIGNED BY	STUDENT AND PARENT
102. PREPARER'S SOCIAL SECURITY NUMBER	(BLANK)
103. PREPARER'S EIN	(BLANK)
104. PREPARER'S SIGNATURE	(BLANK)

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2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

999-12-1234
WI-01 DRN: 1234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report.

FOR FAA USE ONLY

This information will be used by your Financial Aid Administrator to determine your eligibilty for student aid.

Agency Source: 5
Record Source Code:
Record Type:
Verification Flag:
Model: D

Duplicate Copy:
SysGen:
Dependency Override:
Special Handling:
Early Analysis Flag:

Reject Reasons:
Application Receipt Date:
Transaction Receipt Date: 01/28/2000
Subsequent Application Flag: 01/28/2000
Reprocessing Code:

MONTHS:	1	2	3	4	5	6	7	8	9	10	11	12
PRIMARY EFC:	01333	02666	03999	05332	00665	07998	09331	10664	1200	12065	12130	12195
SECONDARY EFC:												

INTERMEDIATE COMPUTE VALUES:

TI:	000125965	**ATI:**	000065523	**STX:**	000008818	**EA:**	000028100	**STI:**	000000000
IPA:	000020140	**AI:**	000060442	**CAI:**	000000000	**DNW:**	-00021800	**FTI:**	000125965
APA:	000228600	**PCA:**	000000000	**AAI:**	000060442	**TPC:**	000024000		
TSC:	000000000	**PC:**	000012000	**SIC:**	000000000	**SCA:**	000000000		

Auto Zero EFC Flag:
SNT Flag: N
Pell Eligible Flag:

MATCH FLAGS:

SSN Match Flag: 1
INS Match Flag:
NSLDS Match Flag: 1
VA Match Flag: 3

Selective Service Registration Flag:
INS Verification #: 999999999999999
NSLDS Results Flag: 3
PRIS Match Flag:

Selective Service Match:
SSA Citizenship Code: A
NSLDS Transaction Number: 01

COMMENTS: 006 113

2000-2001 Student Aid Report
Federal Student Aid Programs
Part 2 - Information Review Form

OMB No. 1845-0132
Form Approved
EXP. 12/31/2001

Processed: 03-21-2000
EFC: 12000

- Pay special attention to any items in **BOLDFACE TYPE**; they may need to be corrected.
- To correct any item, print the correct answer in the boxes to the right of the item in question.
- To delete a preprinted answer in the "YOU TOLD US" column, draw a line completely through the previous answer **and** through the answer boxes or ovals to the right of the item.
- Use the code information on the Instructions and Codes page if you need to correct item 31.
- If you make corrections, sign and send BOTH pages of Part 2 to the address on the last page of Part 2.
- Do not attach tax returns or other documents.
- If an answer is zero, write in "0".
- Report dollar amounts (such as $12,356.00) like this: **SAMPLE** ➡ $ 12 , 356 **(no cents)**
- If you need to correct an item that contains an oval ○, completely fill in the oval as follows: ●
  Do not ⊗ or ✓ ovals. Erase or white-out mistakes completely.
- Print corrections neatly in answer boxes: **SAMPLE** ➡ 15 ELM ST

999-12-1234
WI-01 DRN: 1234

Step One: YOU (THE STUDENT)

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
1. Last Name WILLIAMSON	
2. First Name VANESSA	3. Middle Initial N.
4. Permanent Street Address 1209 DOWNTHA RD	
5. City MORGAN	
6. State Abbreviation CA	7. ZIP Code 98765
8. Social Security Number 999-12-1234	- -
9. Date of Birth DECEMBER 25, 1982	/ / 19 Use MM/DD/CCYY format (e.g., 05/01/1980)
10. Permanent Home Phone Number (707) 555-5377	-
11. Do you have a Driver's License? YES	Yes ○ 1 No ○ 2
12. Driver's License Number 999-12-1234	
13. Driver's License State Abbreviation CA	
14. Citizenship Status U.S.CITIZEN	U.S. Citizen ○ 1 Eligible Non-Citizen ○ 2 Neither ○ 3
15. Alien Registration Number (BLANK)	A
16. Marital Status SINGLE	Single, Divorced or Widowed ○ 1 Married ○ 2 Separated ○ 3
17. Date of Marital Status (BLANK)	/ Use MM/CCYY format (e.g., 05/1996)

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
18. Summer Term 2000 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
19. Fall Semester or Quarter 2000 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
20. Winter Quarter 2000-2001 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
21. Spring Semester or Quarter 2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
22. Summer Term 2001 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
23. Father's Educational Level COLLEGE	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
24. Mother's Educational Level COLLEGE	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
25. State of Legal Residence Abbreviation CA	☐☐
26. Did you become a legal resident of this state before January 1, 1995? YES	Yes ○ 1 No ○ 2
27. If you answered "No" to question 26, date you became a legal resident.	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
28. Drug Conviction Eligibility? (BLANK)	Eligible ○ 1 Don't know/ Not Eligible ○ 2
29. Are you male? NO	Yes ○ 1 No ○ 2
30. If you are male, 18-25, not registered, do you want Selective Service to register you? (BLANK)	Yes ○ 1 No ○ 2
31. Type of Degree/Certificate 1ST BA	☐ Enter Code from Instructions

32. Grade Level In College In 2000-2001? 1ST NEVER ATTENDED	1st Never Attended ○ 1 1st Previously Attended ○ 2 2nd/Sophomore ○ 3 3rd/Junior ○ 4 4th/Senior ○ 5 5th or More ○ 6 Graduate/Professional ○ 7
33. High School Diploma or GED? YES	Yes ○ 1 No ○ 2
34. First Bachelor's Degree by 7-1-2000? NO	Yes ○ 1 No ○ 2
35. Interested in Student Loans? YES	Yes ○ 1 No ○ 2
36. Interested in Work-Study? YES	Yes ○ 1 No ○ 2

Step Two: 1999 STUDENT (AND SPOUSE) INCOME AND ASSETS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
37. Filed 1999 Income Tax Return NOT GOING TO FILE	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
38. Type of 1999 Tax Form Used	A. IRS 1040............................ ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile........................ ○ 2 C. A foreign tax return............ ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau...... ○ 4
39. If you filed or will file a 1040, were you eligible to file a 1040A or 1040EZ?	Yes ○ 1 No/ don't know ○ 2
40. Adjusted Gross Income From IRS Form $	$ ☐☐☐ , ☐☐☐
41. U.S. Income Tax Paid $	$ ☐☐ , ☐☐☐
42. Exemptions Claimed	☐☐
43. Earned Income Credit $	$ ☐☐ , ☐☐☐

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
44. Student's Income Earned From Work $ 000,000	$ ☐☐☐ , ☐☐☐
45. Spouse's Income Earned From Work $ 000, 000	$ ☐☐☐ , ☐☐☐
46. Amount From Worksheet A $ 00,000	$ ☐☐ , ☐☐☐
47. Amount From Worksheet B $ 00,000	$ ☐☐ , ☐☐☐
48. Cash, Savings, and Checking $ 000,000	$ ☐☐☐ , ☐☐☐
49. Net Worth of Real Estate/Investments $ 000,000	$ ☐☐☐ , ☐☐☐
50. Net Worth of Business $ 000,000	$ ☐☐☐ , ☐☐☐
51. Net Worth of Investment Farm $ 000,000	$ ☐☐☐ , ☐☐☐
52. How many Months Receive VA Education Benefits?	☐☐
53. Monthly VA Benefits Amount $	$ ☐☐☐

DRN: 1234

Step Three: STUDENT STATUS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.	YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
54. Born Before 1-1-1977? NO	Yes ○ 1 No ○ 2	57. Have Dependents Other Than Spouse? NO	Yes ○ 1 No ○ 2
55. Working on a degree beyond a bachelor's degree in 2000-2001? NO	Yes ○ 1 No ○ 2	58. Orphan or Ward of Court? NO	Yes ○ 1 No ○ 2
56. Are You Married? NO	Yes ○ 1 No ○ 2	59. Veteran of U.S. Armed Forces? NO	Yes ○ 1 No ○ 2

Step Four: 1999 PARENTAL INFORMATION

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
60. Parent(s) Marital Status MARRIED	Married ○ 1 Single ○ 2 Divorced/Separated ○ 3 Widowed ○ 4
61. Your **Father's** Social Security Number 222-22-2222	☐☐☐ – ☐☐ – ☐☐☐☐
62. Your **Father's** Last Name WILLIAMSON	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
63. Your **Mother's** Social Security Number 333-33-3333	☐☐☐ – ☐☐ – ☐☐☐☐
64. Your **Mother's** Last Name WILLIAMSON	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
65. Parent(s) number of family members in 2000-2001 05	☐☐
66. Parent(s) number of family members in college in 2000-2001 02	☐
67. Parent(s) state of legal residence CA	☐☐
68. Parent(s) legal resident of the state before 1-1-1995? YES	Yes ○ 1 No ○ 2
69. If "No" to question 68, enter the date parent became legal resident.	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
70. Age of older Parent? 50	☐☐
71. Filed 1999 Income Tax Return HAVE ALREADY FILED	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
72. Type of 1999 Tax Form Used IRS 1040	A. IRS 1040............................ ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile...................... ○ 2 C. A foreign tax return........... ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau.... ○ 4
73. If your Parent(s) filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? NO	Yes ○ 1 No/don't know ○ 2

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
74. Adjusted Gross Income From IRS Form $ 125,965	$ ☐☐☐ , ☐☐☐
75. U.S. Income Tax Paid $ 24,228	$ ☐☐☐ , ☐☐☐
76. Exemptions Claimed 05	☐☐
77. Earned Income Credit $ 00,000	$ ☐☐ , ☐☐☐
78. Father's Income Earned From Work $ 60,965	$ ☐☐☐ , ☐☐☐
79. Mother's Income Earned From Work $ 65,000	$ ☐☐☐ , ☐☐☐
80. Amount From Worksheet A $ 00,000	$ ☐☐ , ☐☐☐
81. Amount From Worksheet B $ 00,000	$ ☐☐ , ☐☐☐
82. Cash, Savings, and Checking $ 5,000	$ ☐☐☐ , ☐☐☐
83. Net Worth of Real Estate/Investments $ 000,000	$ ☐☐☐ , ☐☐☐
84. Net Worth of Business $ 000,000	$ ☐☐☐ , ☐☐☐
85. Net Worth of Investment Farm $ 000,000	$ ☐☐☐ , ☐☐☐

Step Five: STUDENT'S HOUSEHOLD INFORMATION

86. Number of Family Members in 2000-2001 ☐☐

87. Number in College in 2000-2001 ☐

Step Six: STUDENT'S SCHOOL INFORMATION

Housing Plans: 1 -- on-campus 3 -- with parent(s)
2 -- off-campus

YOU TOLD US	NEW/CORRECTED COLLEGE NAME, CITY, STATE	Enter Code From Above
88. First College Name, City and State GREAT STATE UNIVERSITY 5050 GREAT ST., COLLEGETOWN, CA 94187		89. Housing Plans ON CAMPUS ☐
90. Second College Name, City and State MORGAN COLLEGE 2000 HILLTOP DR, MORGAN, CA 98765		91. Housing Plans WITH PARENT(S) ☐
92. Third College Name, City and State LOVELY COMMUNITY COLLEGE 3963 WORTH LANE, LOVELY, CA 90356		93. Housing Plans ON CAMPUS ☐
94. Fourth College Name, City and State		95. Housing Plans (BLANK) ☐
96. Fifth College Name, City and State		97. Housing Plans (BLANK) ☐
98. Sixth College Name, City and State		99. Housing Plans (BLANK) ☐
100. Date Completed JANUARY 07, 2000	**DO NOT CORRECT**	
101. Signed By? STUDENT AND PARENT	**DO NOT CORRECT**	
102. Preparer's Social Security Number	☐☐☐ - ☐☐ - ☐☐☐☐	
103. Preparer's EIN	☐☐ - ☐☐☐☐☐☐☐	
104. Preparer's Signature		

Application Receipt Date: 01/15/2000

Step Seven: PLEASE READ, SIGN, AND DATE

IF YOU MADE NO CHANGES

- Do NOT send your SAR to either address given on this page.
- Follow the instructions on Part 1 of your SAR. You may need to contact your school.

IF YOU MADE CHANGES

- Read and Sign the Certification statement to the right
- Send BOTH pages of Part 2 to:

Federal Student Aid Programs
P.O. Box 7020
Lawrence, KS 66044-7020

IF YOU NEED ANOTHER COPY OF YOUR SAR

- Write to:

Federal Student Aid Programs
P.O. Box 7021
Lawrence, KS 66044-7021

- Include your name, social security number, and signature.

CERTIFICATION

All of the information on this SAR is true and complete to the best of my knowledge. If I am asked, I agree to give proof that my information is correct. The proof might include a copy of the 1999 U.S. Income Tax Form filed by me or my family. I understand that if I purposely give false or misleading information on this SAR, I may be subject to a $10,000 fine, a prison sentence, or both.

Student Signature (sign in box below)

1 Student Date

VANESSA N. WILLIAMSON

Parent Signature (one parent whose information is provided in Step Four.)

2 Parent Date

School Use Only

Professional Judgment D/O 1 ○ 2 ○ FAA Adjustment ○ 1

Federal School Code ☐☐☐☐☐☐

FAA Signature
1

MDE Use Only

DE ☐ Special Handle ☐ ☐☐☐☐☐☐☐☐☐

Meet Victor Valdez...

Victor V. Valdez, a senior at Overnell High School in Midtown, Louisiana, has decided that he wants to continue his education, but he's not sure what career path he wants to take. He has always been interested in drawing and designing, and he sometimes gets to help design landscapes at his part-time job at the local nursery. He has considered going to the local graphic design school or maybe starting out studying plant science at the community college. His parents have encouraged him to continue his education and have offered as much assistance as possible.

His family's finances are tight. His father, Victor, Sr., is the assistant manager of a department store in the local mall. His mother, Victoria, was laid off two months ago from her job as a factory worker when her employer downsized the company's workforce in Midtown. She has been unable to find work since. Victor's parents are worried that soon they will be unable to make the $650 monthly mortgage payments on their three-bedroom house they purchased eight years ago. Victor's two younger brothers are in elementary school.

Completing the FAFSA—Victor

Victor was born on March 11, 1982. He and his parents are U.S. citizens. Victor is about to finish his senior year of high school and will graduate in June. His parents are also high school graduates. His mother is 42 and his father is 43 years old. Victor's Social Security Number and driver's license numbers are the same: 999-87-6543. His home telephone number is 504-555-5826.

Victor's parents' only income for 1999 was what they reported on their 1999 IRS Form 1040A. Victor's father made $20,300 while his mother made $12,000 before she was laid off. They reported five exemptions and their Adjusted Gross Income (AGI) was $32,400. They paid $1,838 in taxes. They haven't been able to save much for Victor's college expenses and are fairly certain they will not be able to provide monetary support to their son while he is in school. They have about $500 in their checking account.

Victor earned $2,753 as a landscaper in 1999. He filed a 1040EZ with zero exemptions and did not owe the IRS any money. He has tried to save money for his college expenses but he only has about $200 in a savings account. As a result, he wants any aid he might be eligible for—including work-study. Also, since he is unsure when or where he might take classes, he wants to make sure he can get as much aid as possible starting in the fall. He may attend full time every semester, or may go part time for some of the year. He and his parents live at 720 Park Street, Midtown, LA 70196. Before Midtown, they lived in New Orleans for over ten years.

Victor has never been convicted of any illegal drug offense. Victor has not yet registered with the Selective Service, but would like to do so.

Victor is considering three schools.

Creole School of Art and Design
4300 Cajun Drive
New Orleans, LA 70111
Federal School Code: 273653

Victor would attend full time, live at home, and commute to classes.

Praline Community College
915 Ennee Road
Midtown, LA 70196
Federal School Code: 562266

Victor would attend part time and live at home until he decides what he wants to do.

Pleasant University
4000 Nice Street
Pleasantville, LA 70171
Federal School Code: 807968

Victor would live on campus and attend full time.

Form **1040EZ**

Department of the Treasury—Internal Revenue Service

Income Tax Return for Single and Joint Filers With No Dependents (99) 1999

OMB No. 1545-0675

Use the IRS label here

Your first name and initial: Victor V. Last name: Valdez

If a joint return, spouse's first name and initial: Last name:

Home address (number and street). If you have a P.O. box, see page 10: 720 Park St. Apt. no.:

City, town or post office, state, and ZIP code. If you have a foreign address, see page 10: Midtown LA 70196

Your social security number: 999 87 6543

Spouse's social security number:

▲ **IMPORTANT!** ▲ You must enter your SSN(s) above.

Presidential Election Campaign (See page 10.)

Note: *Checking "Yes" will not change your tax or reduce your refund.*

Do you want $3 to go to this fund? ▶ Yes ☐ No ☐

If a joint return, does your spouse want $3 to go to this fund? ▶ Yes ☐ No ☐

			Dollars	Cents
Income Attach Copy B of Form(s) W-2 here. Enclose, but do not staple, any payment.	1	Total wages, salaries, and tips. This should be shown in box 1 of your W-2 form(s). Attach your W-2 form(s).	2,753	00
	2	Taxable interest. If the total is over $400, you cannot use Form 1040EZ.	0	00
	3	Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends (see page 11).	0	00
	4	Add lines 1, 2, and 3. This is your **adjusted gross income.**	2,753	00
Note: *You must check Yes or No*	5	Can your parents (or someone else) claim you on their return? **Yes.** ☑ Enter amount from worksheet on back. **No.** ☐ If **single**, enter 7,050.00. If **married**, enter 12,700.00. See back for explanation.	2,753	00
	6	Subtract line 5 from line 4. If line 5 is larger than line 4, enter 0. This is your **taxable income.** ▶	0	00
Payments and tax	7	Enter your Federal income tax withheld from box 2 of your W-2 form(s).	200	00
	8a	**Earned income credit** (see page 12). b Nontaxable earned income: enter type and amount below. Type: $:	0	00
	9	Add lines 7 and 8a. These are your **total payments.**	200	00
	10	**Tax.** Use the amount on **line 6 above** to find your tax in the tax table on pages 20-24 of the booklet. Then, enter the tax from the table on this line.	0	00
Refund	11a	If line 9 is larger than line 10, subtract line 10 from line 9. This is your **refund.**	200	00
Have it directly deposited! See page 15 and fill in 11b, 11c, and 11d.	b	Routing number		
	c	Type: Checking ☐ Savings ☐		
	d	Account number		
Amount you owe	12	If line 10 is larger than line 9, subtract line 9 from line 10. This is the **amount you owe.** See page 17 for details on how to pay.	0	00

I have read this return. Under penalties of perjury, I declare that to the best of my knowledge and belief, the return is true, correct, and accurately lists all amounts and sources of income I received during the tax year.

Sign here ▶ Keep copy for your records.

Your signature:

Date: Your occupation:

Spouse's signature if joint return. See page 10:

Date: Spouse's occupation:

For Official Use Only

1	2	3	4	5
☐	☐	☐	☐	☐
☐	☐	☐	☐	☐
6	7	8	9	10

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 19. Cat. No. 11329W 1999 Form 1040EZ

Form **1040A** Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return **1999** IRS Use Only—Do not write or staple in this space

OMB No. 1545-0085

Label (See page 18.)

Use the IRS label. Otherwise, please print or type.

LABEL HERE

Your first name and initial: Victor V. Last name: Valdez

If a joint return, spouse's first name and initial: Victoria V. Last name: Valdez

Home address (number and street). If you have a P.O. box, see page 19: 720 Park St. Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, see page 19: Midtown LA 70196

Your social security number 212:12:1212

Spouse's social security number 343:43:4343

▲ IMPORTANT! ▲

You **must** enter your SSN(s) above.

Presidential Election Campaign Fund (See page 19.) Yes No

Do you want $3 to go to this fund? ☐ ☐

If a joint return, does your spouse want $3 to go to this fund? ☐ ☐

Note: *Checking "Yes" will not change your tax or reduce your refund.*

Filing status

1 ☐ Single

2 ☒ Married filing joint return (even if only one had income)

3 ☐ Married filing separate return. Enter spouse's social security number above and full name here. ▶

4 ☐ Head of household (with qualifying person). (See page 20.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶

5 ☐ Qualifying widow(er) with dependent child (year spouse died ▶ 19). (See page 21.)

Check only one box.

Exemptions

6a ☒ **Yourself.** If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a

b ☒ **Spouse**

No. of boxes checked on 6a and 6b: 2

c **Dependents:**

If more than seven dependents, see page 21.

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 22)
Victor V. Valdez	999:87:6543	son	☐
Vick A. Valdez	878:78:7878	son	☐
Val B. Valdez	656:56:5656	son	☐
			☐
			☐
			☐
			☐

No. of your children on 6c who:
- lived with you: 3
- did not live with you due to divorce or separation (see page 23):

Dependents on 6c not entered above:

d Total number of exemptions claimed. Add numbers entered on lines above: 5

Income

Attach Copy B of your Forms W-2 here. Also attach Form 1099-R if tax was withheld.

If you did not get a W-2, see page 24.

Enclose, but do not staple, any payment.

7	Wages, salaries, tips, etc. Attach Form(s) W-2.		7	32,300 00
8a	**Taxable** interest. Attach Schedule 1 if required.		8a	0 00
b	**Tax-exempt** interest. DO NOT include on line 8a.	8b		
9	Ordinary dividends. Attach Schedule 1 if required.		9	0 00
10a	Total IRA distributions.	10a 0 00	10b Taxable amount (see page 24). 10b	0 00
11a	Total pensions and annuities.	11a 0 00	11b Taxable amount (see page 25). 11b	0 00
12	Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends.		12	100 00
13a	Social security benefits.	13a 0 00	13b Taxable amount (see page 27). 13b	
14	Add lines 7 through 13b (far right column). This is your **total income.** ▶		14	32400 00

Adjusted gross income

15	IRA deduction (see page 28).	15		
16	Student loan interest deduction (see page 28).	16		
17	Add lines 15 and 16. These are your **total adjustments.**		17	0 00
18	Subtract line 17 from line 14. This is your **adjusted gross income.** ▶		18	32400 00

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 49. Cat. No. 11327A 1999 Form 1040A

BEST COPY AVAILABLE

Taxable income	19	Enter the amount from line 18.				19	32400	00
	20a	Check if: ☐ You were 65 or older ☐ Blind ☐ Spouse was 65 or older ☐ Blind	**Enter number of boxes checked** ▶			20a		
	b	If you are married filing separately and your spouse itemizes deductions, see page 30 and check here . . . . ▶				20b ☐		
	21	Enter the **standard deduction** for your filing status. **But see page 31 if** you checked any box on line 20a or 20b **OR** if someone can claim you as a dependent. • Single—$4,300 • Married filing jointly or Qualifying widow(er)—$7,200 • Head of household—$6,350 • Married filing separately—$3,600				21	7100	00
	22	Subtract line 21 from line 19. If line 21 is more than line 19, enter -0-.				22	25300	00
	23	Multiply $2,750 by the total number of exemptions claimed on line 6d.				23	13500	00
	24	Subtract line 23 from line 22. If line 23 is more than line 22, enter -0-. This is your **taxable income.** ▶				24	11900	00
Tax, credits, and payments	25	Find the tax on the amount on line 24 (see page 31).				25	1838	00
	26	Credit for child and dependent care expenses. Attach Schedule 2.	26	0	00			
	27	Credit for the elderly or the disabled. Attach Schedule 3.	27	0	00			
	28	Child tax credit (see page 32).	28	0	00			
	29	Education credits. Attach Form 8863.	29	0	00			
	30	Adoption credit. Attach Form 8839.	30	0	00			
	31	Add lines 26 through 30. These are your **total credits.**				31	0	00
	32	Subtract line 31 from line 25. If line 31 is more than line 25, enter -0-.				32	1838	00
	33	Advance earned income credit payments from Form(s) W-2.				33	0	00
	34	Add lines 32 and 33. This is your **total tax.** ▶				34	1838	00
	35	Total Federal income tax withheld from Forms W-2 and 1099.	35	1000	00			
	36	1999 estimated tax payments and amount applied from 1998 return.	36	0	00			
	37a	**Earned income credit.** Attach Schedule EIC if you have a qualifying child.	37a	0	00			
	b	Nontaxable earned income: amount ▶ and type ▶						
	38	Additional child tax credit. Attach Form 8812.	38	0	00			
	39	Add lines 35, 36, 37a, and 38. These are your **total payments.** ▶				39	1000	00
Refund Have it directly deposited! See page 43 and fill in 41b, 41c, and 41d.	40	If line 39 is more than line 34, subtract line 34 from line 39. This is the amount you **overpaid.**				40	0	00
	41a	Amount of line 40 you want **refunded to you.**				41a	0	00
	▶ b	Routing number ☐☐☐☐☐☐☐☐☐ ▶ c Type: ☐ Checking ☐ Savings						
	▶ d	Account number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐						
	42	Amount of line 40 you want **applied to your 2000 estimated tax.**	42					
Amount you owe	43	If line 34 is more than line 39, subtract line 39 from line 34. This is the **amount you owe.** For details on how to pay, see page 44.				43	838	00
	44	Estimated tax penalty (see page 44).	44					

Sign here

Joint return? See page 19

Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Your signature	Date	Your occupation	Daytime telephone number (optional)
Spouse's signature. If joint return, BOTH must sign.	Date	Spouse's occupation	[redacted]

Paid preparer's use only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed) and address ▶			EIN
			ZIP code

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2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

999-87-6543
VA-01 DRN: 5234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report

000117C041

VICTOR V. VALDEZ
720 PARK ST
MIDTOWN, LA 70196

JANUARY 30, 2000
EFC: 600

Read this letter carefully and review each item on Part 2 of this Student Aid Report (SAR). Follow the instructions at the top of Part 2 and in the Free Application for Federal Student Aid (FAFSA) instruction booklet to help you make corrections. If all of the information on your SAR is correct, you do not need to return it to the Federal Student Aid Programs. For additional help with your SAR, contact your Financial Aid Administrater (FAA) at your school or the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-443-3243).

If all of the information on this SAR is correct, you may be eligible to receive a Federal Pell Grant and other Federal student aid in 2000-2001. Your FAA at your school will determine whether you meet all eligibility requirements to receive aid. The amount of aid will depend on the cost of attendance at your school, your ennrollment status (full-time, three quarter-time, half-time, or less than half-time), Congressional budget restrictions, and other factors.

HERE IS WHAT YOU NEED TO DO NOW: Review the information on Part 2. If any of the information is incorrect, follow the instructions at the top of Part 2 to make corrections. IF ALL OF THE INFORMATION IS CORRECT, you do not need to submit the SAR to the schools you listed. All of your schools will receive the information electronically.

We have forwarded your name to Selective Service for registration, as you requested. They will process your registration request 30 days prior to your 18th birthday.

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This section contains information from your student aid application (shaded items display parents' information, if provided). Use the Information Review Form (Part 2 of your SAR) to correct this information. **Do not make corrections on this page; it is for your files.**

1. LAST NAME	VALDEZ
2. FIRST NAME	VICTOR
3. MIDDLE INITIAL	V
4. PERMANENT STREET ADDRESS	702 PARK ST
5. CITY	MIDTOWN
6. STATE ABBREVIATION	LA
7. ZIP CODE	70196
8. SOCIAL SECURITY NUMBER	999-87-6543
9. DATE OF BIRTH	MARCH 11, 1982
10. PERMANENT HOME PHONE NUMBER	(504) 555-5826
11. DO YOU HAVE A DRIVER'S LICENSE?	YES
12. DRIVER'S LICENSE NUMBER	999-87-6543
13. DRIVER'S LICENSE STATE ABBREVIATION	LA
14. CITIZENSHIP STATUS	U.S. CITIZEN
15. ALIEN REGISTRATION NUMBER	(BLANK)
16. MARITAL STATUS	SINGLE
17. DATE OF MARITAL STATUS	(BLANK)
18. ENROLLMENT STATUS SUMMER TERM 2000	NOT ATTENDING
19. ENROLLMENT STATUS FALL SEM/QTR 2000	FULL TIME
20. ENROLLMENT STATUS WINTER QTR 2000-2001	FULL TIME
21. ENROLLMENT STATUS SPRING SEM/QTR 2001	FULL TIME
22. ENROLLMENT STATUS SUMMER TERM 2001	FULL TIME
23. FATHER'S EDUCATIONAL LEVEL	HIGH SCHOOL
24. MOTHER'S EDUCATIONAL LEVEL	HIGH SCHOOL
25. STATE OF LEGAL RESIDENCE ABBREVIATION	LA
26. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
27. DATE YOU BECAME A LEGAL RESIDENT	(BLANK)
28. DRUG CONVICTION ELIGIBILITY?	(BLANK)
29. ARE YOU MALE?	YES
30. REGISTER YOU FOR SELECTIVE SERVICE?	YES
31. TYPE OF DEGREE/CERTIFICATE	1ST BA
32. GRADE LEVEL IN COLLEGE IN 2000-2001	1ST NEVER ATTENDED
33. HIGH SCHOOL DIPLOMA OR GED?	YES
34. FIRST BACHELOR'S DEGREE BY 7-1-2000?	NO
35. INTERESTED IN STUDENT LOANS?	YES
36. INTERESTED IN WORK-STUDY?	YES
37. FILED 1999 IRS INCOME TAX RETURN	ALREADY FILED
38. TYPE OF 1999 TAX FORM USED	1040A/EZ/TEL
39. ELIGIBLE TO FILE A 1040A OR 1040EZ?	YES
40. ADJUSTED GROSS INCOME FROM IRS FORM	$ 2,753
41. U.S. INCOME TAX PAID	$ 0
42. EXEMPTIONS CLAIMED	00
43. EARNED INCOME CREDIT	$ (BLANK)
44. STUDENT'S INCOME EARNED FROM WORK	$ 0
45. SPOUSE'S INCOME EARNED FROM WORK	$ 0
46. AMOUNT FROM WORKSHEET A	$ 0
47. AMOUNT FROM WORKSHEET B	$ 0
48. CASH, SAVINGS, AND CHECKING	$ 200
49. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 0
50. NET WORTH OF BUSINESS	$ 0
51. NET WORTH OF INVESTMENT FARM	$ 0
52. HOW MANY MONTHS RECEIVE VA BENEFITS?	00
53. MONTHLY VA EDUCATION BENEFITS AMOUNT	$ 0
54. BORN BEFORE 1-1-1977?	NO
55. WORKING ON DEGREE BEYOND BACHELOR'S?	NO
56. ARE YOU MARRIED?	NO
57. HAVE DEPENDENTS OTHER THAN SPOUSE?	NO
58. ORPHAN OR WARD OF COURT?	NO
59. VETERAN OF U.S. ARMED FORCES?	NO
60. PARENT(S) MARITAL STATUS	MARRIED
61. YOUR FATHER'S SOCIAL SECURITY NUMBER	212-12-1212
62. YOUR FATHER'S LAST NAME	VALDEZ
63. YOUR MOTHER'S SOCIAL SECURITY NUMBER	343-43-4343
64. YOUR MOTHER'S LAST NAME	VALDEZ
65. NUMBER OF FAMILY MEMBERS IN 2000-2001	05
66. NUMBER IN COLLEGE IN 2000-2001	1
67. PARENT(S) STATE OF LEGAL RESIDENCE	LA
68. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
69. DATE PARENT(S) BECAME LEGAL RESIDENT	(BLANK)
70. AGE OF OLDER PARENT	43
71. PARENT(S) FILED 1999 INCOME TAX RETURN	ALREADY FILED
72. TYPE OF 1999 TAX FORM USED	1040A/EZ/TEL
73. ELIGIBLE TO FILE A 1040A OR 1040EZ?	YES
74. ADJUSTED GROSS INCOME FROM IRS FORM	$ 32,400
75. U.S. INCOME TAX PAID	$ 1,838
76. EXEMPTIONS CLAIMED	05
77. EARNED INCOME CREDIT	$ 0
78. FATHER'S INCOME EARNED FROM WORK	$ 20,300
79. MOTHER'S INCOME EARNED FROM WORK	$ 12,000
80. AMOUNT FROM WORKSHEET A	$ 0
81. AMOUNT FROM WORKSHEET B	$ 0
82. CASH, SAVINGS, AND CHECKING	$ 500
83. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 0
84. NET WORTH OF BUSINESS	$ 0
85. NET WORTH OF INVESTMENT FARM	$ 0
86. NUMBER OF FAMILY MEMBERS IN 2000-2001	01
87. NUMBER IN COLLEGE IN 2000-2001	1
88. FIRST COLLEGE NAME	CREOLE SCHOOL OF ART AND DESIGN
89. FIRST HOUSING PLANS	WITH PARENT(S)
90. SECOND COLLEGE NAME	PRALINE COMMUNITY COLLEGE
91. SECOND HOUSING PLANS	WITH PARENT(S)
92. THIRD COLLEGE NAME	PLEASANT UNIVERSITY
93. THIRD HOUSING PLANS	OFF CAMPUS
94. FOURTH COLLEGE NAME	(BLANK)
95. FOURTH HOUSING PLANS	(BLANK)
96. FIFTH COLLEGE NAME	(BLANK)
97. FIFTH HOUSING PLANS	(BLANK)
98. SIXTH COLLEGE NAME	(BLANK)
99. SIXTH HOUSING PLANS	(BLANK)
100. DATE COMPLETED	JANUARY 27, 2000
101. SIGNED BY	STUDENT AND PARENT
102. PREPARER'S SOCIAL SECURITY NUMBER	(BLANK)
103. PREPARER'S EIN	(BLANK)
104. PREPARER'S SIGNATURE	(BLANK)

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2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

999-87-6543
VA-01 DRN: 5234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report.

FOR FAA USE ONLY

This information will be used by your Financial Aid Administrator to determine your eligibilty for student aid.

Agency Source: 5
Record Source Code:
Record Type:
Verification Flag:
Model: I

Duplicate Copy:
SysGen:
Dependency Override:
Special Handling:
Early Analysis Flag:

Reject Reasons:
Application Receipt Date:
Transaction Receipt Date: 01/28/2000
Subsequent Application Flag: 01/28/2000
Reprocessing Code:

MONTHS:	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
PRIMARY EFC:	00195	00246	00297	00348	00399	00450	00502	00552	00600	00622	00723	00784
SECONDARY EFC:	00265	00316	00367	00418	00469	00520	00571	00622	00671	00732	00793	00854

INTERMEDIATE COMPUTE VALUES:

TI:	000032400	**ATI:**	000033321	**STX:**	000000972	**EA:**	000002800	**STI:**	000000144
IPA:	000022240	**AI:**	000002079	**CAI:**	000000000	**DNW:**	000000000	**FTI:**	000035153
APA:	000000000	**PCA:**	000000000	**AAI:**	000060442	**TPC:**	000024000		
TSC:	000000000	**PC:**	000000457	**SIC:**	000000144	**SCA:**	000000000		

Auto Zero EFC Flag:
SNT Flag: Y
Pell Eligible Flag: Y

MATCH FLAGS:

SSN Match Flag: 1
INS Match Flag:
NSLDS Match Flag: 1
VA Match Flag: 3

Selective Service Registration Flag:
INS Verification #:
NSLDS Results Flag: 3
PRIS Match Flag:

Selective Service Match: Y
SSA Citizenship Code: A
NSLDS Transaction Number: 01

COMMENTS: 006 149 028

2000-2001 Student Aid Report
Federal Student Aid Programs
Part 2 - Information Review Form

OMB No. 1845-0132
Form Approved
EXP. 12/31/2001

Processed: 01-30-2000
EFC: 600

- Pay special attention to any items in **BOLDFACE TYPE**; they may need to be corrected.
- To correct any item, print the correct answer in the boxes to the right of the item in question.
- To delete a preprinted answer in the "YOU TOLD US" column, draw a line completely through the previous answer **and** through the answer boxes or ovals to the right of the item.
- Use the code information on the Instructions and Codes page if you need to correct item 31.
- If you make corrections, sign and send BOTH pages of Part 2 to the address on the last page of Part 2.
- Do not attach tax returns or other documents.
- If an answer is zero, write in "0".
- Report dollar amounts (such as $12,356.00) like this: **SAMPLE** ➡ $ 12,356 **(no cents)**
- If you need to correct an item that contains an oval ○, completely fill in the oval as follows: ●
  Do not ☒ or ✓ ovals. Erase or white-out mistakes completely.
- Print corrections neatly in answer boxes: **SAMPLE** ➡ 15 ELM ST

999-87-6543
VA-01 DRN: 5234

Step One: YOU (THE STUDENT)

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
1. Last Name VALDEZ	
2. First Name VICTOR	3. Middle Initial V.
4. Permanent Street Address 702 PARK ST	
5. City MIDTOWN	
6. State Abbreviation LA	7. ZIP Code 70196
8. Social Security Number 999-87-6543	– –
9. Date of Birth MARCH 11, 1982	/ / 19 Use MM/DD/CCYY format (e.g., 05/01/1980)
10. Permanent Home Phone Number (504) 555-5826	–
11. Do you have a Driver's License? YES	Yes ○ 1 No ○ 2
12. Driver's License Number 999-87-6543	
13. Driver's License State Abbreviation LA	
14. Citizenship Status U.S.CITIZEN	U.S. Citizen ○ 1 Eligible Non-Citizen ○ 2 Neither ○ 3
15. Alien Registration Number (BLANK)	A
16. Marital Status SINGLE	Single, Divorced or Widowed ○ 1 Married ○ 2 Separated ○ 3
17. Date of Marital Status (BLANK)	/ Use MM/CCYY format (e.g., 05/1996)

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
18. Summer Term 2000 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
19. Fall Semester or Quarter 2000 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
20. Winter Quarter 2000-2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
21. Spring Semester or Quarter 2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
22. Summer Term 2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
23. Father's Educational Level HIGH SCHOOL	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
24. Mother's Educational Level HIGH SCHOOL	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
25. State of Legal Residence Abbreviation LA	☐☐
26. Did you become a legal resident of this state before January 1, 1995? YES	Yes ○ 1 No ○ 2
27. If you answered "No" to question 26, date you became a legal resident.	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
28. Drug Conviction Eligibility? (BLANK)	Eligible ○ 1 Don't know/ Not Eligible ○ 2
29. Are you male? YES	Yes ○ 1 No ○ 2
30. If you are male, 18-25, not registered, do you want Selective Service to register you? YES	Yes ○ 1 No ○ 2
31. Type of Degree/Certificate 1ST BA	☐ Enter Code from Instructions

32. Grade Level In College in 2000-2001? 1ST NEVER ATTENDED	1st Never Attended ○ 1 1st Previously Attended ○ 2 2nd/Sophomore ○ 3 3rd/Junior ○ 4 4th/Senior ○ 5 5th or More ○ 6 Graduate/Professional ○ 7
33. High School Diploma or GED? YES	Yes ○ 1 No ○ 2
34. First Bachelor's Degree by 7-1-2000? NO	Yes ○ 1 No ○ 2
35. Interested in Student Loans? YES	Yes ○ 1 No ○ 2
36. Interested in Work-Study? NO	Yes ○ 1 No ○ 2

Step Two: 1999 STUDENT (AND SPOUSE) INCOME AND ASSETS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
37. Filed 1999 Income Tax Return ALREADY FILED	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
38. Type of 1999 Tax Form Used 1040A/EZ/TEL	A. IRS 1040........................ ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile........................ ○ 2 C. A foreign tax return............ ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau...... ○ 4
39. If you filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? YES	Yes ○ 1 No/ don't know ○ 2
40. Adjusted Gross Income From IRS Form $ 2,753	$ ☐☐☐ , ☐☐☐
41. U.S. Income Tax Paid $ 00,000	$ ☐☐ , ☐☐☐
42. Exemptions Claimed 00	☐☐
43. Earned Income Credit $ 00,000	$ ☐☐ , ☐☐☐

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
44. Student's Income Earned From Work $ 002,753	$ ☐☐☐ , ☐☐☐
45. Spouse's Income Earned From Work $ 000, 000	$ ☐☐☐ , ☐☐☐
46. Amount From Worksheet A $ 00,000	$ ☐☐ , ☐☐☐
47. Amount From Worksheet B $ 00,000	$ ☐☐ , ☐☐☐
48. Cash, Savings, and Checking $ 000,200	$ ☐☐☐ , ☐☐☐
49. Net Worth of Real Estate/Investments $ 000,000	$ ☐☐☐ , ☐☐☐
50. Net Worth of Business $ 000,000	$ ☐☐☐ , ☐☐☐
51. Net Worth of Investment Farm $ 000,000	$ ☐☐☐ , ☐☐☐
52 How many Months Receive VA Education Benefits? 00	☐☐
53. Monthly VA Benefits Amount $ 000	$ ☐☐☐

Step Three: STUDENT STATUS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
54. Born Before 1-1-1977? NO	Yes ○ 1 No ○ 2
55. Working on a degree beyond a bachelor's degree in 2000-2001? NO	Yes ○ 1 No ○ 2
56. Are You Married? NO	Yes ○ 1 No ○ 2

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
57. Have Dependents Other Than Spouse? NO	Yes ○ 1 No ○ 2
58. Orphan or Ward of Court? NO	Yes ○ 1 No ○ 2
59. Veteran of U.S. Armed Forces? NO	Yes ○ 1 No ○ 2

Step Four: 1999 PARENTAL INFORMATION

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
60. Parent(s) Marital Status MARRIED	Married ○ 1 Single ○ 2 Divorced/Separated ○ 3 Widowed ○ 4
61. Your **Father's** Social Security Number 212-12-1212	☐☐☐ - ☐☐ - ☐☐☐☐
62. Your **Father's** Last Name VALDEZ	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
63. Your **Mother's** Social Security Number 343-43-4343	☐☐☐ - ☐☐ - ☐☐☐☐
64. Your **Mother's** Last Name VALDEZ	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
65. Parent(s) number of family members in 2000-2001 05	☐☐
66. Parent(s) number of family members in college in 2000-2001 01	☐
67. Parent(s) state of legal residence LA	☐☐
68. Parent(s) legal resident of the state before 1-1-1995? YES	Yes ○ 1 No ○ 2
69. If "No" to question 68, enter the date parent became legal resident.	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
70. Age of older Parent? 43	☐☐
71. Filed 1999 Income Tax Return HAVE ALREADY FILED	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
72. Type of 1999 Tax Form Used IRS 1040A/EZ/TEL	A. IRS 1040 ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile ○ 2 C. A foreign tax return ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau ○ 4
73. If your Parent(s) filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? YES	Yes ○ 1 No/don't know ○ 2

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
74. Adjusted Gross Income From IRS Form $ 34,400	$ ☐☐☐ , ☐☐☐
75. U.S. Income Tax Paid $ 1,838	$ ☐☐☐ , ☐☐☐
76. Exemptions Claimed 05	☐☐
77. Earned Income Credit $ 00,000	$ ☐☐ , ☐☐☐
78. Father's Income Earned From Work $ 20,300	$ ☐☐☐ , ☐☐☐
79. Mother's Income Earned From Work $ 12,000	$ ☐☐☐ , ☐☐☐
80. Amount From Worksheet A $ 00,000	$ ☐☐ , ☐☐☐
81. Amount From Worksheet B $ 00,000	$ ☐☐ , ☐☐☐
82. Cash, Savings, and Checking $ 500	$ ☐☐☐ , ☐☐☐
83. Net Worth of Real Estate/Investments $ 000,000	$ ☐☐☐ , ☐☐☐
84. Net Worth of Business $ 000,000	$ ☐☐☐ , ☐☐☐
85. Net Worth of Investment Farm $ 000,000	$ ☐☐☐ , ☐☐☐

Step Five: STUDENT'S HOUSEHOLD INFORMATION

86. Number of Family Members in 2000-2001 01	☐☐	87. Number in College in 2000-2001 1	☐

Step Six: STUDENT'S SCHOOL INFORMATION

Housing Plans: 1 -- on-campus 3 -- with parent(s)
2 -- off-campus

YOU TOLD US	NEW/CORRECTED COLLEGE NAME, CITY, STATE	Enter Code From Above	
88. First College Name, City and State CREOLE SCHOOL OF ART AND DESIGN 4300 CAJUN DR, NEW ORLEANS, AL 70111		89. Housing Plans WITH PARENT(S)	☐
90. Second College Name, City and State PRALINE COMMUNITY COLLEGE 915 ENNEE ROAD, MIDTOWN, LA 70196		91. Housing Plans WITH PARENT(S)	☐
92. Third College Name, City and State PLEASANT UNIVERSITY 4000 NICE ST., PLEASANTVILLE, LA 70171		93. Housing Plans WITH PARENT(S)	☐
94. Fourth College Name, City and State		95. Housing Plans (BLANK)	☐
96. Fifth College Name, City and State		97. Housing Plans (BLANK)	☐
98. Sixth College Name, City and State		99. Housing Plans (BLANK)	☐
100. Date Completed JANUARY 07, 2000	DO NOT CORRECT		
101. Signed By? STUDENT AND PARENT	DO NOT CORRECT		
102. Preparer's Social Security Number	☐☐☐-☐☐-☐☐☐☐		
103. Preparer's EIN	☐☐-☐☐☐☐☐☐☐		
104. Preparer's Signature			

Application Receipt Date: 01/15/2000

Step Seven: PLEASE READ, SIGN, AND DATE

IF YOU MADE NO CHANGES

- Do NOT send your SAR to either address given on this page.
- Follow the instructions on Part 1 of your SAR. You may need to contact your school.

IF YOU MADE CHANGES

- Read and Sign the Certification statement to the right
- Send BOTH pages of Part 2 to:

Federal Student Aid Programs
P.O. Box 7020
Lawrence, KS 66044-7020

IF YOU NEED ANOTHER COPY OF YOUR SAR

- Write to:

Federal Student Aid Programs
P.O. Box 7021
Lawrence, KS 66044-7021

- Include your name, social security number, and signature.

CERTIFICATION

All of the information on this SAR is true and complete to the best of my knowledge. If I am asked, I agree to give proof that my information is correct. The proof might include a copy of the 1999 U.S. Income Tax Form filed by me or my family. I understand that if I purposely give false or misleading information on this SAR, I may be subject to a $10,000 fine, a prison sentence, or both.

Student Signature (sign in box below)

1 Student Date

VICTOR V. VALDEZ

Parent Signature (one parent whose information is provided in Step Four.)

2 Parent Date

School Use Only

Professional Judgment D/O 1 ○ 2 ○ FAA Adjustment ○ 1

Federal School Code ☐☐☐☐☐☐

FAA Signature
1

MDE Use Only

DE ☐ Special Handle ☐ ☐☐☐☐☐☐☐☐☐

Meet Violet Flowers...

Violet S. Flowers, a senior at Rose High School in Bloomington, Massachusetts, is near the top of her class and has aspirations of attending a big university to study software engineering. She has already received two small local scholarships totaling $1,000. Her mother, however, is worried about the cost of college. They recently got a catalog in the mail from Ivy University that indicated that tuition alone would be $15,000 per year. Neighbors have told her that this is typical for the type of school that Violet wants to attend.

Violet's parents divorced four years ago, although both Violet and her mother, Venus, have kept her father's name. She lives with Venus who works full time as a sales clerk at a local drug store. The family receives regular $400 monthly child support payments from Violet's father. Violet works 15 hours per week as a waitress at an Italian restaurant in downtown Bloomington. Her tips and wages total $600 in a "good" month. Violet and her mother (Violet is an only child) live in a two-bedroom apartment and pay $550 per month in rent.

Completing the FAFSA—Violet

Violet was born on October 19, 1982. She and her mother are U.S. citizens. Violet is about to finish her senior year and will graduate high school in June. Her mother, Venus, also a high school graduate, is 45 years old, and is divorced from Violet's father. Violet is Venus's only child. Violet's Social Security and driver's license numbers are the same: 991-23-4567. Her home telephone number is 413-555-5854. Her father's Social Security number is 888-88-8888.

Venus's only income from 1999 was what she reported on her 1999 IRS Form 1040A. She reported two exemptions and was eligible for a $2,210 Earned Income Credit (EIC). Her Adjusted Gross Income (AGI) was $20,000 and she paid $1,298 in taxes. She has $100 in a savings account for emergencies.

Violet's only income in 1999 was $3,125 she earned as a waitress. She's learned from her mother to try to keep a small amount of what she earns in a savings account. Currently, she has about $100. She filed a 1040EZ with zero exemptions and didn't owe the IRS any taxes. Violet lives with her mother at 2020 Magnolia Way, Bloomington, MA 00180, and has since October 1985. Since she'll be attending school full-time in the fall she has decided that she would like to live in a dormitory on campus, wherever she goes. She also has decided that she might take classes during the winter quarter, since she would like to get ahead and plans to travel next summer.

Violet has never been convicted of any illegal drug offenses.

Realizing that the cost of her education will be challenging, Violet and her mother are very concerned and are open to whatever aid might be available, including work-study. Violet has narrowed her choices down to three schools:

Ivy University
2000 Big Deal Drive
Beantown, MA 02218
Federal School Code: 722018

Bloom College
1019 Sunnyside Street
Zinnia, MA 02100
Federal School Code: 001446

Garden Community College
400 Hothouse Way
Greenville, MT 59700
Federal School Code: 244754

Department of the Treasury—Internal Revenue Service

Form **1040EZ** **Income Tax Return for Single and Joint Filers With No Dependents** (99) **1999** OMB No 1545 0675

Use the IRS label here

Your first name and initial: Violet G. Last name: Flowers

If a joint return, spouse's first name and initial: Last name:

Home address (number and street). If you have a P.O. box, see page 10: 2020 Magnolia Way Apt. no:

City, town or post office, state, and ZIP code. If you have a foreign address, see page 10: Bloomington MA 00180

Your social security number 991 23 4567

Spouse's social security number

Presidential Election Campaign (See page 10)

Note: *Checking "Yes" will not change your tax or reduce your refund.*

Do you want $3 to go to this fund? ▶ Yes ☐ No ☐

If a joint return, does your spouse want $3 to go to this fund? ▶ Yes ☐ No ☐

▲ IMPORTANT! ▲ You must enter your SSN(s) above.

Income

Attach Copy B of Form(s) W-2 here. Enclose, but do not staple, any payment.

		Dollars	Cents
1	Total wages, salaries, and tips. This should be shown in box 1 of your W-2 form(s). Attach your W-2 form(s). 1	3,125	00
2	**Taxable interest. If the total is over $400, you cannot use Form 1040EZ.** 2	0	00
3	**Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends** (see page 11). 3	0	00
4	Add lines 1, 2, and 3. This is your **adjusted gross income.** 4	3,125	00
5	Can your parents (or someone else) claim you on their return? Yes. ☐ Enter amount from worksheet on back. No. ☐ If **single**, enter 7,050.00. If **married**, enter 12,700.00. See back for explanation. 5	3,375	00
6	Subtract line 5 from line 4. If line 5 is larger than line 4, enter 0. This is your **taxable income.** ▶ 6	0	00

Note: *You must check Yes or No.*

Payments and tax

		Dollars	Cents
7	Enter your Federal income tax withheld from box 2 of your W-2 form(s). 7	700	00
8a	**Earned income credit** (see page 12). b Nontaxable earned income: enter type and amount below. Type $ 8a	0	00
9	Add lines 7 and 8a. These are your **total payments.** 9	700	00
10	**Tax.** Use the amount on **line 6 above** to find your tax in the tax table on pages 20-24 of the booklet. Then, enter the tax from the table on this line. 10	0	00

Refund

Have it directly deposited! See page 15 and fill in 11b, 11c, and 11d

11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your **refund.** 11a 700 . 00

▶ b Routing number

▶ c Type: Checking ☐ Savings ☐ d Account number

Amount you owe

12 If line 10 is larger than line 9, subtract line 9 from line 10. This is the **amount you owe.** See page 17 for details on how to pay. 12

I have read this return. Under penalties of perjury, I declare that to the best of my knowledge and belief, the return is true, correct, and accurately lists all amounts and sources of income I received during the tax year.

Sign here ▶ Keep copy for your records.

Your signature

Date Your occupation

Spouse's signature if joint return. See page 10

Date Spouse's occupation

For Official Use Only 1 2 3 4 5 6 7 8 9 10

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 19. Cat. No. 11329W 1999 Form 1040EZ

Form **1040A**

Department of the Treasury—Internal Revenue Service

U.S. Individual Income Tax Return 1999

IRS Use Only—Do not write or staple in this space

OMB No. 1545-0085

Label (See page 18.)

Use the IRS label. Otherwise, please print or type.

LABEL HERE

Your first name and initial: Venus O.
Last name: Flowers
Your social security number: 321 : 12 : 3321
If a joint return, spouse's first name and initial:
Last name:
Spouse's social security number: : :
Home address (number and street). If you have a P.O. box, see page 19: 2020 Magnolia Way
Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, see page 19: Bloomington MA 00180

▲IMPORTANT!▲ You **must** enter your SSN(s) above.

Presidential Election Campaign Fund (See page 19.) Yes No
Do you want $3 to go to this fund? ☐ ☐
If a joint return, does your spouse want $3 to go to this fund? ☐ ☐

Note: *Checking "Yes" will not change your tax or reduce your refund.*

Filing status

1 ☒ Single
2 ☐ Married filing joint return (even if only one had income)
3 ☐ Married filing separate return. Enter spouse's social security number above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See page 20.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child (year spouse died ▶ 19). (See page 21.)

Check only one box.

Exemptions

6a ☒ **Yourself.** If your parent (or someone else) can claim you as a dependent on his or her tax return, **do not** check box 6a.
b ☐ **Spouse**

No. of boxes checked on 6a and 6b: 1

c **Dependents:**

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if qualifying child for child tax credit (see page 22)
Violet Flowers	991 : 23 : 4567	daughter	☐
			☐
			☐
			☐
			☐
			☐
			☐

If more than seven dependents, see page 21.

No. of your children on 6c who:
- lived with you: 1
- did not live with you due to divorce or separation (see page 23):

Dependents on 6c not entered above:

d Total number of exemptions claimed.

Add numbers entered on lines above: 2

Income

Attach Copy B of your Forms W-2 here. Also attach Form 1099-R if tax was withheld.

If you did not get a W-2, see page 24.

Enclose, but do not staple, any payment.

7	Wages, salaries, tips, etc. Attach Form(s) W-2.	7	20000 00
8a	**Taxable** interest. Attach Schedule 1 if required.	8a	0 00
b	**Tax-exempt** interest. DO NOT include on line 8a. 8b		
9	Ordinary dividends. Attach Schedule 1 if required.	9	0 00
10a	Total IRA distributions. 10a — 10b Taxable amount (see page 24).	10b	0 00
11a	Total pensions and annuities. 11a — 11b Taxable amount (see page 25).	11b	0 00
12	Unemployment compensation, qualified state tuition program earnings, and Alaska Permanent Fund dividends.	12	0 00
13a	Social security benefits. 13a — 13b Taxable amount (see page 27).	13b	0 00
14	Add lines 7 through 13b (far right column). This is your **total income.** ▶	14	20000 00

Adjusted gross income

15	IRA deduction (see page 28). 15		
16	Student loan interest deduction (see page 28). 16		
17	Add lines 15 and 16. These are your **total adjustments.**	17	0 00
18	Subtract line 17 from line 14. This is your **adjusted gross income.** ▶	18	20000 00

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 49. Cat. No. 11327A **1999 Form 1040A**

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Taxable income	19	Enter the amount from line 18.				19	20000	00
	20a	Check if: ☐ You were 65 or older ☐ Blind ☐ Spouse was 65 or older ☐ Blind **Enter number of boxes checked** ▶ 20a ☐						
	b	If you are married filing separately and your spouse itemizes deductions, see page 30 and check here . . . . ▶ 20b ☐						
	21	Enter the **standard deduction** for your filing status. **But see page 31 if** you checked any box on line 20a or 20b **OR** if someone can claim you as a dependent. • Single—$4,300 • Married filing jointly or Qualifying widow(er)—$7,200 • Head of household—$6,350 • Married filing separately—$3,600				21	4250	00
	22	Subtract line 21 from line 19. If line 21 is more than line 19, enter -0-.				22	15750	00
	23	Multiply $2,750 by the total number of exemptions claimed on line 6d.				23	5400	00
	24	Subtract line 23 from line 22. If line 23 is more than line 22, enter -0-. This is your **taxable income.** ▶				24	10350	00
Tax, credits, and payments	25	Find the tax on the amount on line 24 (see page 31).				25	1298	00
	26	Credit for child and dependent care expenses. Attach Schedule 2.	26	0	00			
	27	Credit for the elderly or the disabled. Attach Schedule 3.	27	0	00			
	28	Child tax credit (see page 32).	28	0	00			
	29	Education credits. Attach Form 8863.	29	0	00			
	30	Adoption credit. Attach Form 8839.	30	0	00			
	31	Add lines 26 through 30. These are your **total credits.**				31	0	00
	32	Subtract line 31 from line 25. If line 31 is more than line 25, enter -0-.				32	1298	00
	33	Advance earned income credit payments from Form(s) W-2.				33	0	00
	34	Add lines 32 and 33. This is your **total tax.** ▶				34	1298	00
	35	Total Federal income tax withheld from Forms W-2 and 1099.	35	2000	00			
	36	1999 estimated tax payments and amount applied from 1998 return.	36					
	37a	**Earned income credit.** Attach Schedule EIC if you have a qualifying child.	37a	2210	00			
	b	Nontaxable earned income: amount ▶ and type ▶						
	38	Additional child tax credit. Attach Form 8812.	38					
	39	Add lines 35, 36, 37a, and 38. These are your **total payments.** ▶				39	4210	00
Refund	40	If line 39 is more than line 34, subtract line 34 from line 39. This is the amount you **overpaid.**				40	2912	00
Have it directly deposited! See page 43 and fill in 41b, 41c, and 41d.	41a	Amount of line 40 you want **refunded to you.**				41a	2912	00
	▶ b	Routing number ☐☐☐☐☐☐☐☐☐ ▶ c Type: ☐ Checking ☐ Savings						
	▶ d	Account number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐						
	42	Amount of line 40 you want **applied to your 2000 estimated tax.**	42					
Amount you owe	43	If line 34 is more than line 39, subtract line 39 from line 34. This is the **amount you owe.** For details on how to pay, see page 44.				43	0	00
	44	Estimated tax penalty (see page 44).	44					

Sign here

Joint return? See page 19. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately list all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based on all information of which the preparer has any knowledge.

Your signature	Date	Your occupation	Daytime telephone number (optional)
Spouse's signature. If joint return, BOTH must sign.	Date	Spouse's occupation	

Paid preparer's use only

Preparer's signature ▶	Date	Check if self-employed ☐	Preparer's SSN or PTIN
Firm's name (or yours if self-employed) and address ▶			EIN
			ZIP code

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DEPARTMENT OF EDUCATION
UNITED STATES OF AMERICA

2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

991-23-4567
FL-01 DRN: 6234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report.

000117C041

VIOLET S. FLOWERS
2020 MAGNOLIA WAY
BLOOMINGTON, MA 00180

JANUARY 30, 2000
EFC: 300 *

Read this letter carefully and review each item on Part 2 of this Student Aid Report (SAR). Follow the instructions at the top of Part 2 and in the Free Application for Federal Student Aid (FAFSA) instruction booklet to help you make corrections. If all of the information on your SAR is correct, you do not need to return it to the Federal Student Aid Programs. For additional help with your SAR, contact your Financial Aid Administrater (FAA) at your school or the Federal Student Aid Information Center at 1-800-4FED-AID (1-800-443-3243).

If all of the information on this SAR is correct, you may be eligible to receive a Federal Pell Grant and other Federal student aid in 2000-2001. Your FAA at your school will determine whether you meet all eligibility requirements to receive aid. The amount of aid will depend on the cost of attendance at your school, your ennrollment status (full-time, three quarter-time, half-time, or less than half-time), Congressional budget restrictions, and other factors.

HERE IS WHAT YOU NEED TO DO NOW: Review the information on Part 2. If any of the information is incorrect, follow the instructions at the top of Part 2 to make corrections. IF ALL OF THE INFORMATION IS CORRECT, you do not need to submit the SAR to the schools you listed. All of your schools will receive the information electronically.

Your application has been selected for review in a process called verification. You must submit to your school signed copies of certain 1999 financial documents for you and/or your parents. Contact your FAA at your school to find out which documents are required.

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This section contains information from your student aid application (shaded items display parents' information, if provided). Use the Information Review Form (Part 2 of your SAR) to correct this information. Do not make corrections on this page; it is for your files.

1. LAST NAME	FLOWERS
2. FIRST NAME	VIOLET
3. MIDDLE INITIAL	S
4. PERMANENT STREET ADDRESS	2020 MAGNOLIA WAY
5. CITY	BLOOMINGTON
6. STATE ABBREVIATION	MA
7. ZIP CODE	00180
8. SOCIAL SECURITY NUMBER	991-23-4567
9. DATE OF BIRTH	OCTOBER 19, 1982
10. PERMANENT HOME PHONE NUMBER	(413) 555-5854
11. DO YOU HAVE A DRIVER'S LICENSE?	YES
12. DRIVER'S LICENSE NUMBER	991-23-4567
13. DRIVER'S LICENSE STATE ABBREVIATION	MA
14. CITIZENSHIP STATUS	U.S. CITIZEN
15. ALIEN REGISTRATION NUMBER	(BLANK)
16. MARITAL STATUS	SINGLE
17. DATE OF MARITAL STATUS	(BLANK)
18. ENROLLMENT STATUS SUMMER TERM 2000	NOT ATTENDING
19. ENROLLMENT STATUS FALL SEM/QTR 2000	FULL TIME
20. ENROLLMENT STATUS WINTER QTR 2000-2001	FULL TIME
21. ENROLLMENT STATUS SPRING SEM/QTR 2001	FULL TIME
22. ENROLLMENT STATUS SUMMER TERM 2001	NOT ATTENDING
23. FATHER'S EDUCATIONAL LEVEL	OTHER/UNKNOWN
24. MOTHER'S EDUCATIONAL LEVEL	HIGH SCHOOL
25. STATE OF LEGAL RESIDENCE ABBREVIATION	MA
26. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
27. DATE YOU BECAME A LEGAL RESIDENT	(BLANK)
28. DRUG CONVICTION ELIGIBILITY?	(BLANK)
29. ARE YOU MALE?	NO
30. REGISTER YOU FOR SELECTIVE SERVICE?	(BLANK)
31. TYPE OF DEGREE/CERTIFICATE	1ST BA
32. GRADE LEVEL IN COLLEGE IN 2000-2001	1ST NEVER ATTENDED
33. HIGH SCHOOL DIPLOMA OR GED?	YES
34. FIRST BACHELOR'S DEGREE BY 7-1-2000?	NO
35. INTERESTED IN STUDENT LOANS?	YES
36. INTERESTED IN WORK-STUDY?	YES
37. FILED 1999 IRS INCOME TAX RETURN	ALREADY FILED
38. TYPE OF 1999 TAX FORM USED	1040A/EZ/TEL
39. ELIGIBLE TO FILE A 1040A OR 1040EZ?	(BLANK)
40. ADJUSTED GROSS INCOME FROM IRS FORM	$ 3,125
41. U.S. INCOME TAX PAID	$ 0
42. EXEMPTIONS CLAIMED	00
43. EARNED INCOME CREDIT	$ (BLANK)
44. STUDENT'S INCOME EARNED FROM WORK	$ 3,125
45. SPOUSE'S INCOME EARNED FROM WORK	$ 0
46. AMOUNT FROM WORKSHEET A	$ 0
47. AMOUNT FROM WORKSHEET B	$ 0
48. CASH, SAVINGS, AND CHECKING	$ 100
49. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 0
50. NET WORTH OF BUSINESS	$ 0
51. NET WORTH OF INVESTMENT FARM	$ 0
52. HOW MANY MONTHS RECEIVE VA BENEFITS?	00

53. MONTHLY VA EDUCATION BENEFITS AMOUNT	$ 0
54. BORN BEFORE 1-1-1977?	NO
55. WORKING ON DEGREE BEYOND BACHELOR'S?	NO
56. ARE YOU MARRIED?	NO
57. HAVE DEPENDENTS OTHER THAN SPOUSE?	NO
58. ORPHAN OR WARD OF COURT?	NO
59. VETERAN OF U.S. ARMED FORCES?	NO
60. PARENT(S) MARITAL STATUS	DIVORCED/SEPARATED
61. YOUR FATHER'S SOCIAL SECURITY NUMBER	(BLANK)
62. YOUR FATHER'S LAST NAME	(BLANK)
63. YOUR MOTHER'S SOCIAL SECURITY NUMBER	321-12-3321
64. YOUR MOTHER'S LAST NAME	FLOWERS
65. NUMBER OF FAMILY MEMBERS IN 2000-2001	02
66. NUMBER IN COLLEGE IN 2000-2001	1
67. PARENT(S) STATE OF LEGAL RESIDENCE	MA
68. LEGAL RESIDENT BEFORE JANUARY 1, 1995?	YES
69. DATE PARENT(S) BECAME LEGAL RESIDENT	(BLANK)
70. AGE OF OLDER PARENT	45
71. PARENT(S) FILED 1999 INCOME TAX RETURN	ALREADY FILED
72. TYPE OF 1999 TAX FORM USED	1040A/EZ/TEL
73. ELIGIBLE TO FILE A 1040A OR 1040EZ?	(BLANK)
74. ADJUSTED GROSS INCOME FROM IRS FORM	$ 20,000
75. U.S. INCOME TAX PAID	$ 1,298
76. EXEMPTIONS CLAIMED	02
77. EARNED INCOME CREDIT	$ 2,210
78. FATHER'S INCOME EARNED FROM WORK	$ (BLANK)
79. MOTHER'S INCOME EARNED FROM WORK	$ 20,000
80. AMOUNT FROM WORKSHEET A	$ 4,800
81. AMOUNT FROM WORKSHEET B	$ 0
82. CASH, SAVINGS, AND CHECKING	$ 100
83. NET WORTH OF REAL ESTATE/INVESTMENTS	$ 0
84. NET WORTH OF BUSINESS	$ 0
85. NET WORTH OF INVESTMENT FARM	$ 0
86. NUMBER OF FAMILY MEMBERS IN 2000-2001	01
87. NUMBER IN COLLEGE IN 2000-2001	1
88. FIRST COLLEGE NAME	IVY UNIVERSITY
89. FIRST HOUSING PLANS	ON CAMPUS
90. SECOND COLLEGE NAME	BLOOM COLLEGE
91. SECOND HOUSING PLANS	ON CAMPUS
92. THIRD COLLEGE NAME	GARDEN COMMUNITY COLLEGE
93. THIRD HOUSING PLANS	ON CAMPUS
94. FOURTH COLLEGE NAME	(BLANK)
95. FOURTH HOUSING PLANS	(BLANK)
96. FIFTH COLLEGE NAME	(BLANK)
97. FIFTH HOUSING PLANS	(BLANK)
98. SIXTH COLLEGE NAME	(BLANK)
99. SIXTH HOUSING PLANS	(BLANK)
100. DATE COMPLETED	JANUARY 27, 2000
101. SIGNED BY	STUDENT AND PARENT
102. PREPARER'S SOCIAL SECURITY NUMBER	(BLANK)
103. PREPARER'S EIN	(BLANK)
104. PREPARER'S SIGNATURE	(BLANK)

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2000-2001 Student Aid Report (SAR)
Federal Student Aid Programs
Part 1 - Information Summary

OMB No. 1845-0132
Form Approved
Exp. 12/31/2001

991-23-4567
FL-01 DRN: 6234

IMPORTANT: Read **ALL** information in Part 1 to find out what to do with this Report.

FOR FAA USE ONLY

This information will be used by your Financial Aid Administrator to determine your eligibilty for student aid.

Agency Source: 5
Record Source Code:
Record Type:
Verification Flag: A
Model: D

Duplicate Copy:
SysGen:
Dependency Override:
Special Handling:
Early Analysis Flag:

Reject Reasons:
Application Receipt Date:
Transaction Receipt Date: 01/28/2000
Subsequent Application Flag: 01/28/2000
Reprocessing Code:

MONTHS:	1	2	3	4	5	6	7	8	9	10	11	12
PRIMARY EFC:	00300	00300	00300	00300	00300	00300	00300	00300	00300	00300	00300	00300
SECONDARY EFC:												

INTERMEDIATE COMPUTE VALUES:

TI: 000015200
IPA: 000012260
APA: 000026800
TSC: 000000000

ATI: 000019104
AI: -00003904
PCA: 000000000
PC: 000000000

STX: 000001216
CAI: -00003904
AAI: -00003904
SIC: 000000265

EA: 000002800
DNW: -00026700
TPC: 000000000
SCA: 000000035

STI: 000000265
FTI: 000018325

Auto Zero EFC Flag:
SNT Flag: N
Pell Eligible Flag: Y

MATCH FLAGS:

SSN Match Flag: 1
INS Match Flag:
NSLDS Match Flag: 1
VA Match Flag: 3

Selective Service Registration Flag:
INS Verification #:
NSLDS Results Flag: 3
PRIS Match Flag:

Selective Service Match:
SSA Citizenship Code: A
NSLDS Transaction Number: 01

COMMENTS: 006 151 170

2000-2001 Student Aid Report
Federal Student Aid Programs
Part 2 - Information Review Form

OMB No. 1845-0132
Form Approved
EXP. 12/31/2001

Processed: 01-30-2000
EFC: 300

- Pay special attention to any items in **BOLDFACE TYPE**; they may need to be corrected.
- To correct any item, print the correct answer in the boxes to the right of the item in question.
- To delete a preprinted answer in the "YOU TOLD US" column, draw a line completely through the previous answer **and** through the answer boxes or ovals to the right of the item.
- Use the code information on the Instructions and Codes page if you need to correct item 31.
- If you make corrections, sign and send BOTH pages of Part 2 to the address on the last page of Part 2.
- Do not attach tax returns or other documents.
- If an answer is zero, write in "0".
- Report dollar amounts (such as $12,356.00) like this: **SAMPLE ➡** $ 12,356 (no cents)
- If you need to correct an item that contains an oval ○, completely fill in the oval as follows: ●
  Do not Ⓧ or ✓ ovals. Erase or white-out mistakes completely.
- Print corrections neatly in answer boxes: **SAMPLE ➡** 15 ELM ST

991-23-4567
VA-01 DRN: 6234

Step One: YOU (THE STUDENT)

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
1. Last Name FLOWERS	
2. First Name VIOLET	3. Middle Initial S.
4. Permanent Street Address 2020 MAGNOLIA WAY	
5. City BLOOMINGTON	
6. State Abbreviation MA	7. ZIP Code 00180
8. Social Security Number 991-23-4567	– –
9. Date of Birth OCTOBER 19, 1982	/ / 19 Use MM/DD/CCYY format (e.g., 05/01/1980)
10. Permanent Home Phone Number (413) 555-5854	–
11. Do you have a Driver's License? YES	Yes ○ 1 No ○ 2
12. Driver's License Number 991-23-4567	
13. Driver's License State Abbreviation MA	
14. Citizenship Status U.S.CITIZEN	U.S. Citizen ○ 1 Eligible Non-Citizen ○ 2 Neither ○ 3
15. Alien Registration Number (BLANK)	A
16. Marital Status SINGLE	Single, Divorced or Widowed ○ 1 Married ○ 2 Separated ○ 3
17. Date of Marital Status (BLANK)	/ Use MM/CCYY format (e.g., 05/1996)

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YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
18. Summer Term 2000 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
19. Fall Semester or Quarter 2000 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
20. Winter Quarter 2000-2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
21. Spring Semester or Quarter 2001 FULL TIME	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
22. Summer Term 2001 NOT ATTENDING	Full time ○ 1 3/4 time ○ 2 Half time ○ 3 Less than half time ○ 4 Not attending ○ 5
23. Father's Educational Level OTHER/UNKNOWN	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
24. Mother's Educational Level HIGH SCHOOL	Middle school/Jr. High ○ 1 High school ○ 2 College or beyond ○ 3 Other/unknown ○ 4
25. State of Legal Residence Abbreviation MA	☐☐
26. Did you become a legal resident of this state before January 1, 1995? YES	Yes ○ 1 No ○ 2
27. If you answered "No" to question 26, date you became a legal resident. (BLANK)	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
28. Drug Conviction Eligibility? (BLANK)	Eligible ○ 1 Don't know/ Not Eligible ○ 2
29. Are you male? NO	Yes ○ 1 No ○ 2
30. If you are male, 18-25, not registered, do you want Selective Service to register you? (BLANK)	Yes ○ 1 No ○ 2
31. Type of Degree/Certificate 1ST BA	☐ Enter Code from Instructions

32. Grade Level In College In 2000-2001? 1ST NEVER ATTENDED	1st Never Attended ○ 1 1st Previously Attended ○ 2 2nd/Sophomore ○ 3 3rd/Junior ○ 4 4th/Senior ○ 5 5th or More ○ 6 Graduate/Professional ○ 7
33. High School Diploma or GED? YES	Yes ○ 1 No ○ 2
34. First Bachelor's Degree by 7-1-2000? NO	Yes ○ 1 No ○ 2
35. Interested in Student Loans? YES	Yes ○ 1 No ○ 2
36. Interested in Work-Study? NO	Yes ○ 1 No ○ 2

Step Two: 1999 STUDENT (AND SPOUSE) INCOME AND ASSETS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
37. Filed 1999 Income Tax Return ALREADY FILED	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
38. Type of 1999 Tax Form Used 1040A/EZ/TEL	A. IRS 1040............................ ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile....................... ○ 2 C. A foreign tax return............ ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau...... ○ 4
39. If you filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? (BLANK)	Yes ○ 1 No/ don't know ○ 2
40. Adjusted Gross Income From IRS Form $ 3,125	$ ☐☐☐ , ☐☐☐
41. U.S. Income Tax Paid $ 00,000	$ ☐☐ , ☐☐☐
42. Exemptions Claimed 00	☐☐
43. Earned Income Credit $ (BLANK)	$ ☐☐ , ☐☐☐

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
44. Student's Income Earned From Work $ 3,125	$ ☐☐☐ , ☐☐☐
45. Spouse's Income Earned From Work $ (BLANK)	$ ☐☐☐ , ☐☐☐
46. Amount From Worksheet A $ (BLANK)	$ ☐☐ , ☐☐☐
47. Amount From Worksheet B $ (BLANK)	$ ☐☐ , ☐☐☐
48. Cash, Savings, and Checking $ 100	$ ☐☐☐ , ☐☐☐
49. Net Worth of Real Estate/Investments $ (BLANK)	$ ☐☐☐ , ☐☐☐
50. Net Worth of Business $ (BLANK)	$ ☐☐☐ , ☐☐☐
51. Net Worth of Investment Farm $ (BLANK)	$ ☐☐☐ , ☐☐☐
52. How many Months Receive VA Education Benefits? (BLANK)	☐☐
53. Monthly VA Benefits Amount $ (BLANK)	$ ☐☐☐

DRN: 6234

Step Three: STUDENT STATUS

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
54. Born Before 1-1-1977? NO	Yes ○ 1 No ○ 2
55. Working on a degree beyond a bachelor's degree in 2000-2001? NO	Yes ○ 1 No ○ 2
56. Are You Married? NO	Yes ○ 1 No ○ 2

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
57. Have Dependents Other Than Spouse? NO	Yes ○ 1 No ○ 2
58. Orphan or Ward of Court? NO	Yes ○ 1 No ○ 2
59. Veteran of U.S. Armed Forces? NO	Yes ○ 1 No ○ 2

Step Four: 1999 PARENTAL INFORMATION

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
60. Parent(s) Marital Status DIVORCED/SEPARATED	Married ○ 1 Single ○ 2 Divorced/Separated ○ 3 Widowed ○ 4
61. Your **Father's** Social Security Number (BLANK)	☐☐☐ – ☐☐ – ☐☐☐☐
62. Your **Father's** Last Name (BLANK)	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
63. Your **Mother's** Social Security Number 321-12-3321	☐☐☐ – ☐☐ – ☐☐☐☐
64. Your **Mother's** Last Name FLOWERS	☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐
65. Parent(s) number of family members in 2000-2001 02	☐☐
66. Parent(s) number of family members in college in 2000-2001 1	☐
67. Parent(s) state of legal residence MA	☐☐
68. Parent(s) legal resident of the state before 1-1-1995? NO	Yes ○ 1 No ○ 2
69. If "No" to question 68, enter the date parent became legal resident. (BLANK)	☐☐ / ☐☐☐☐ Use MM/CCYY format (e.g., 05/1980)
70. Age of older Parent? 45	☐☐
71. Filed 1999 Income Tax Return HAVE ALREADY FILED	Have already filed ○ 1 Will file, have not yet filed ○ 2 Not going to file. ○ 3
72. Type of 1999 Tax Form Used IRS 1040A/EZ/TEL	A. IRS 1040 ○ 1 B. IRS 1040A, 1040 EZ, 1040 Telefile ○ 2 C. A foreign tax return ○ 3 D. A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau ○ 4
73. If your Parent(s) filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? (BLANK)	Yes ○ 1 No/don't know ○ 2

YOU TOLD US	WRITE IN INFORMATION FOR NEW OR CORRECTED ITEMS ONLY.
74. Adjusted Gross Income From IRS Form $ 20,000	$ ☐☐☐ , ☐☐☐
75. U.S. Income Tax Paid $ 1,298	$ ☐☐☐ , ☐☐☐
76. Exemptions Claimed 02	☐☐
77. Earned Income Credit $ 2,210	$ ☐☐ , ☐☐☐
78. Father's Income Earned From Work $ (BLANK)	$ ☐☐☐ , ☐☐☐
79. Mother's Income Earned From Work $ 20,000	$ ☐☐☐ , ☐☐☐
80. Amount From Worksheet A $ 4,800	$ ☐☐ , ☐☐☐
81. Amount From Worksheet B $ 0	$ ☐☐ , ☐☐☐
82. Cash, Savings, and Checking $ 100	$ ☐☐☐ , ☐☐☐
83. Net Worth of Real Estate/Investments $ 000,000	$ ☐☐☐ , ☐☐☐
84. Net Worth of Business $ 000,000	$ ☐☐☐ , ☐☐☐
85. Net Worth of Investment Farm $ 000,000	$ ☐☐☐ , ☐☐☐

Step Five: STUDENT'S HOUSEHOLD INFORMATION

86. Number of Family Members in 2000-2001
01

87. Number in College in 2000-2001
1

Step Six: STUDENT'S SCHOOL INFORMATION

Housing Plans: 1 -- on-campus 3 -- with parent(s)
2 -- off-campus

YOU TOLD US	NEW/CORRECTED COLLEGE NAME, CITY, STATE	Enter Code From Above
88. First College Name, City and State IVY UNIVERSITY 200 BIG DEAL DRIVE, BEANTOWN, MA 02218		89. Housing Plans ON CAMPUS
90. Second College Name, City and State BLOOM COLLEGE 1019 SUNNYSIDE ST., ZINNA, MA 02100		91. Housing Plans ON CAMPUS
92. Third College Name, City and State GARDEN COMMUNITY COLLEGE 400 HOTHOUSE WAY, GREENVILLE, MT 59700		93. Housing Plans ON CAMPUS
94. Fourth College Name, City and State		95. Housing Plans (BLANK)
96. Fifth College Name, City and State		97. Housing Plans (BLANK)
98. Sixth College Name, City and State		99. Housing Plans (BLANK)
100. Date Completed JANUARY 07, 2000	DO NOT CORRECT	
101. Signed By? STUDENT AND PARENT	DO NOT CORRECT	
102. Preparer's Social Security Number	☐☐☐-☐☐-☐☐☐☐	
103. Preparer's EIN	☐☐-☐☐☐☐☐☐☐	
104. Preparer's Signature		

Application Receipt Date: 01/15/2000

Step Seven: PLEASE READ, SIGN, AND DATE

IF YOU MADE NO CHANGES

- Do NOT send your SAR to either address given on this page.
- Follow the instructions on Part 1 of your SAR. You may need to contact your school.

IF YOU MADE CHANGES

- Read and Sign the Certification statement to the right
- Send BOTH pages of Part 2 to:

Federal Student Aid Programs
P.O. Box 7020
Lawrence, KS 66044-7020

IF YOU NEED ANOTHER COPY OF YOUR SAR

- Write to:

Federal Student Aid Programs
P.O. Box 7021
Lawrence, KS 66044-7021

- Include your name, social security number, and signature.

CERTIFICATION

All of the information on this SAR is true and complete to the best of my knowledge. If I am asked, I agree to give proof that my information is correct. The proof might include a copy of the 1999 U.S. Income Tax Form filed by me or my family. I understand that if I purposely give false or misleading information on this SAR, I may be subject to a $10,000 fine, a prison sentence, or both.

Student Signature (sign in box below)

1 Student Date

VIOLET S. FLOWERS

Parent Signature (one parent whose information is provided in Step Four.)

2 Parent Date

School Use Only

Professional Judgment D/O 1 ○ 2 ○

FAA Adjustment ○ 1

Federal School Code ☐☐☐☐☐☐

FAA Signature

MDE Use Only

DE ☐ Special Handle ☐ ☐☐☐☐☐☐☐☐☐

GROUP ACTIVITIES

Here are some activities that will reinforce concepts you have learned today. These activities are meant to be fun and spark group discussion, as well as ensure that you understand the concepts you have heard about.

Activity 1: Name that Term

Each group should have a 3"x 5" index card showing a Title IV term or acronym that was discussed in the first three sessions (for example, "SAR").

Each group must come up with five one-word clues that describe the Title IV term. For instance, a clue for FAFSA might be "form." None of the clues can be a part of the term itself (for example, "free" for FAFSA, or "report" for SAR).

Each group should rank their five clues from the hardest to the most obvious.

One representative from each group will read the clues to the rest of the class, starting with the hardest. The rest of the class gets the chance to "name that term."

Activity 2: Lessons Learned

Participants should work in their groups to discuss the following questions:

What was the single most important thing you learned this morning that would help you counsel your student (Vanessa, Victor or Violet) about financial aid? Why?

What was the single most important thing you learned this morning that will help you counsel your own students regarding financial aid? Why?

Each group will have about 10 minutes to discuss and record their thoughts.

After about 10 minutes, representatives from three groups—one representing each of the case studies—will share their discussion and thoughts with the class.

Activity 3: What comes next?

For this activity, the Instructor will need eight volunteers from the group.

Each volunteer will be given a placard representing one step in the financial aid process. The volunteers will then arrange themselves in the order that the steps occur.

Step #1:

Step #2:

Step #3:

Step #4:

Step #5:

Step #6:

Step #7:

Step #8: